

A COMPARATIVE ANALYSIS OF THE STRATEGIES OF FISHERIES ACTION GROUPS

COASTAL FISHERIES TRENDS IN ESTONIA



KALANDUSVÕRGUSTIK

2010



COASTAL FISHERIES TRENDS IN ESTONIA



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| | |
|----|---|
| 4 | Contents |
| 6 | Definitions and abbreviations used |
| 7 | Preface |
| 8 | Introduction |
| 10 | Overview of the compilation of strategies |
| 10 | Development of strategies of fisheries areas |
| 12 | Overview of the current situation |
| 12 | General profile of fisheries areas |
| 12 | Harjumaa fisheries area |
| 13 | Hiiumaa fisheries area |
| 13 | Läänemaa fisheries area |
| 14 | Lake Peipsi fisheries area |
| 14 | Pärnumaa fisheries area |
| 15 | Saaremaa fisheries area |
| 15 | Virumaa fisheries area |
| 16 | Lake Võrtsjärv fisheries area |
| 17 | Main problems and needs of the fisheries areas |
| 17 | Poor condition of the fisheries infrastructure |
| 17 | Inadequate facilities for small-scale processing and direct sales of fish |
| 18 | Fishers' low incomes |
| 18 | Little joint action |
| 19 | Untapped tourism potential of coastal villages |
| 19 | Lack of knowledge required to implement the action areas of a strategy |
| 22 | Development visions and objectives |
| 22 | Overview of visions for the fisheries areas |
| 25 | Comparison of visions |
| 25 | Overlaps between and particular features of visions |
| 28 | Action areas and objectives |
| 28 | Renewal of fishing ports and landing sites |
| 28 | Need for implementing the action area |
| 29 | Objectives for the action area |
| 30 | Activities supported |



| | |
|----|---|
| 32 | Processing and direct sales of fisheries products |
| 32 | Need for implementing the action area |
| 32 | Objectives for the action area |
| 34 | Activities supported |
| 35 | Developing fisheries-related tourism and regenerating and developing coastal villages |
| 35 | Need for implementing the action area |
| 36 | Objectives for the action area |
| 38 | Activities supported |
| 40 | Diversification of activities |
| 40 | Need for implementing the action area |
| 40 | Objectives for the action area |
| 42 | Activities supported |
| 43 | Training activities |
| 43 | Need for implementing the action area |
| 43 | Objectives for the action area |
| 45 | Activities supported |
| 46 | Eel fishing industry (Lake Vörtsjärv fisheries area) |
| 46 | Need for implementing the action area |
| 46 | Objectives for the action area |
| 46 | Activities supported |
| 47 | Dredging landing places (Lake Vörtsjärv fisheries area) |
| 47 | Need for implementing the action area |
| 47 | Objectives for the action area |
| 47 | Activities supported |
| 50 | Selection of projects |
| 50 | Processing of project applications |
| 53 | Financial plan |
| 55 | Summary |



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| EEF | European Fisheries Fund |
| LC | Local government |
| NGO | Non-governmental organisation |
| Local fisheries action group | A non-profit association active in a fisheries area comprising various parties involved in the fisheries sector (commercial fishers, fishers' associations, fisheries industry, LCs, organisations in the non-profit sector, and others). |
| Landing site | A location (port, roadstead, landing place) where landing occurs |
| Landing | Removal (discharging) of freight from a ship |
| Measure 4.1 | Measure for the sustainable development of fisheries areas, Operational Programme of the "European Fisheries Fund 2007-2013." |
| SWOT analysis | Strategic planning tool to evaluate internal strengths, weaknesses and external opportunities and threats. |





Estonia is a maritime nation. At least this seems so if one looks at Estonia on a map. The lifestyle of a shore-dwelling people, however, is not visibly widespread, and coastal fisheries are rather unevenly developed. Nonetheless, it could not be said that coastal fishing is defunct. Naturally, along with the deterioration in the condition of fish stocks, fishers' incomes, too, have declined over the past couple of decades, and the popularity of coastal fisheries has been low. As in many sectors of the economy where extensive privatisation occurred during the reforms of the 1990s, coastal fisheries, too, has travelled a road of extensive reforms.

Since the turn of the century, however, attention by the state to coastal fisheries has been increasing gradually, including several steps taken by the Ministry of Agriculture to support coastal fisheries through various development programmes, predominantly co-financed by the EU.

During this programming period, 2007-2013, of the European Fisheries Fund, we decided to establish a stand-alone measure for the development of coastal fisheries in co-operation with fisheries organisations. Perhaps what is most important about this measure is that we have delegated the approval of both the strategy for the use of the programme instruments and of individual projects to the fisheries areas. Rather painlessly, local action groups were formed by more active local fishers, non-profit associations, and local government representatives.

This decision was not simple to make. Nonetheless, we are convinced that this was the right decision. An extensive training programme to assist areas' key people both in organising the development of their strategies and in involving the local community was of great help in this case.

We can probably already claim today that organisations in coastal areas have embraced this approach in a very positive way and, perhaps more importantly, these communities can have their say on broader issues relating to the development of life by the coast. Today, strategies have been compiled and printed for all areas. Also, the implementation of measures has actually begun. It would probably be no exaggeration to claim that what is even more important than the financial assistance provided as part of this measure may be the increase in coastal fishers' awareness and increasing understanding of the need to cooperate. Together with the instruments required for promoting development, action groups have increasingly assumed responsibility also for local development. A fundamental shift has already occurred in their understanding that by engaging in just fishing, without considering marketing and consumers, does not offer great promise.

Of course, for fishers, the development of ports is primary, as they have been grossly under-funded over the past couple of decades. Yet more important still is the development of the so-called vertical and horizontal co-operation within the sector. Here the main objective is perhaps that fishers' catches will command a price that, in the long term, enables them to invest sustainably. The key words here are co-operation and joint sales as near as possible to the end user.

For my part, may I wish all coastal fishers the best of luck in clear long-term planning and decision-making.

Toomas Kevvai

Deputy Secretary General for Rural Development and Fisheries Policy
Ministry of Agriculture



The fisheries sector is important in Estonia in social and regional terms, as it is an important source of employment and income in some areas. In coastal areas and on the islands, fisheries are part of the culture, as a result of which there is a profound socio-cultural aspect to fisheries. Fisheries-related areas in Estonia may be split in two distinct branches: seaside and inland shore areas.

Seaside fisheries-related areas may be divided notionally into three areas: Väinameri (including west of Saaremaa and Hiiumaa), Pärnumaa, and the Gulf of Finland. Inland shore fisheries-related areas include Lakes Peipsi (Peipus), Lämmijärv, and Pihkva (Pskov) and Lake Võrtsjärv¹.

Estonia's fisheries areas are defined by the territories of the following local governments²:

Hiiumaa

Emmaste, Käina, Kõrgessaare, Pühalepa, Kärkla

Saaremaa

Ruhnu, Muhu, Pöide, Laimjala, Valjala, Pihla, Kaarma, Salme, Torgu, Kärla, Lümada, Kihelkonna, Mustjala, Leisi, Orissaare

Pärnumaa

Häädemeeste, Tahkuranna, Paikuse, Audru, Tõstamaa, Varbla, Sindi, Kihnu

Lake Peipsi

Värskä, Mikitamäe, Meeksi, Võnnu, Mäksa, Piirissaare, Vara, Peipsiääre, Alatskivi, Pala, Kasepää, Tabivere, Saare, Palamuse, Lohusuu, Tudulinna, Iisaku, Alajõe, Mustvee, Kallaste, Räpina

Gulf of Finland western area

(hereinafter referred to as Harjumaa fisheries area)

Padise, Keila, Paldiski, Harku, Viimsi, Jõelähtme, Kuusalu, Loksä

Gulf of Finland eastern area

(hereinafter referred to as Virumaa fisheries area)

Vihula, Viru-Nigula, Aseri, Lügänuše, Kohtla, Toila, Vaivara, Narva-Jõesuu, Kunda

Läänemaa

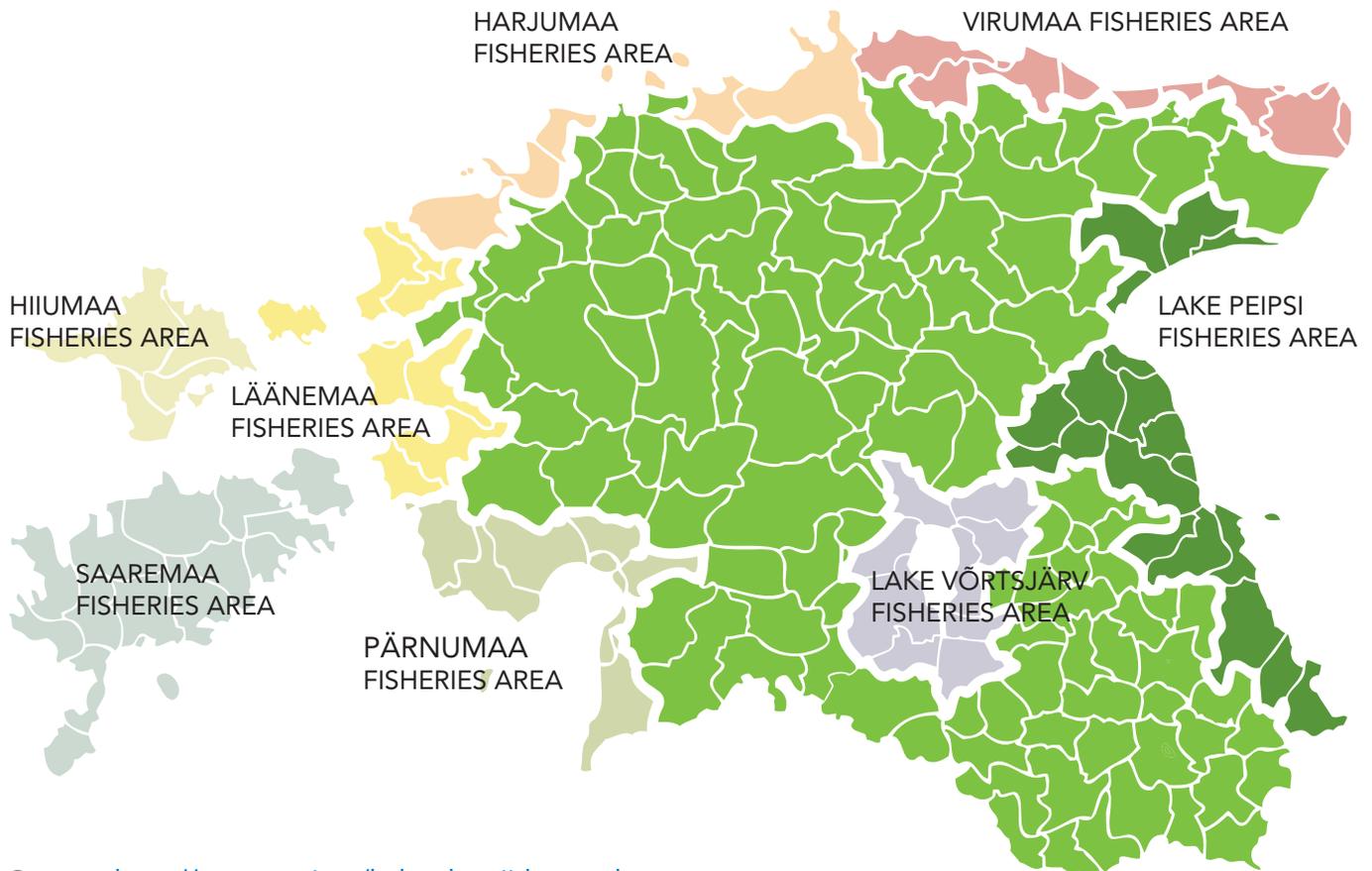
Hanila, Lihula, Martna, Ridala, Vormsi, Oru, Noarootsi, Nõva

Lake Võrtsjärv

Põdrala, Puka, Rõngu, Rannu, Puhja, Laeva, Kolga-Jaani, Viiratsi, Tarvastu

¹ Estonian Fisheries Strategy 2007–2013.

² Source: <http://www.agri.ee/kalanduspiirkonnad>



Source: <http://www.agri.ee/kalanduspiirkonnad>

In Estonia's coastal fisheries, there are several problems, from the poor state of the fisheries' infrastructure to the low profitability of fishing resulting from small catch quantities and sales problems. This has led to a situation where income from fishing has dried up and the demographic of fishers is aging, as younger people are not attracted to commercial fisheries due to the low incomes³. In 2007-2013, with the help of the European Fisheries Fund, the Estonian state is directing approximately 400 million EEK into solving these problems, by joint actions with inhabitants in the coastal areas. For this, a separate support measure is stipulated in the seven-year development plan: support for the sustainable development of fisheries areas (measure 4.1). Support for the sustainable development of fisheries areas is aimed first and foremost at areas with low population density, a decline in fishing or small communities engaged in fisheries. A fisheries area is considered to be an area that includes sea coast, lake shore, ponds or the estuarine area of a river and has significant employment levels in the fisheries sector⁴. Funding decisions have been entrusted to local people, and as a result, strategies of fisheries areas were developed as part of this measure, the aim of which includes guiding the use of measure 4.1 supports in fisheries areas. Strategies were developed during the period of 2008–2009, which were led by local action groups⁵.

³ Ministry of Agriculture, http://www.agri.ee/kalanduspiirkondade_areng

⁴ See <http://www.agri.ee/kalanduspiirkonnad>

⁵ Local action groups are non-profit associations that are active in a fisheries area and comprise various parties involved in the fisheries sector (commercial fishers, fishers' associations, fisheries industry, LCs, organisations in the non-profit sector, and others).



OVERVIEW OF THE COMPILATION OF STRATEGIES

Under the leadership of local action groups, the strategies of fisheries areas have been developed in all fisheries areas to support the sustainable development of the areas. The strategies specify the visions and objectives of the fisheries areas, that is, desired outcomes and how the agreed objectives will be reached. The strategies also include a financial plan describing how supports under measure 4.1 of the Operational Programme of the European Fisheries Fund 2007–2013 – sustainable development of fisheries areas – are planned to be used in a area.

Development of strategies of fisheries areas

The development of the strategies of fisheries areas began with the launch of measure 4.1 of the Operational Programme of the European Fisheries Fund 2007-2013 – the sustainable development of fisheries areas. The strategies were developed by local action groups from 2008-2009. Local organisations which led the development of the strategies have been indicated.

Table 1. The list of organisations responsible for the development of strategies of fisheries areas

| | | |
|-------------------------------|---|---|
| Harjumaa fisheries area | NGO Harju Kalandusühing | Development startegy for Harjumaa fisheries area 2009-2013 |
| Hiiumaa fisheries area | NGO Hiiukala | Development startegy for Hiiumaa fisheries area 2009-2013 |
| Läänemaa fisheries area | Läänemaa Coastalfishing Association | Development startegy for Läänemaa fisheries area 2009-2015 |
| Lake Peipsi fisheries area | Development Association of Peipsi Fishery Area | Development startegy for Lake Peipsi fisheries area 2009-2013 |
| Pänumaa fisheries area | NGO Liivi Lahe Kalanduskogu | Development startegy NGO Liivi Lahe Kalanduskogu area of operation 2013 |
| Saaremaa fisheries area | West-Estonian Islands Fisheries Partnership NGO | Development startegy for Saaremaa fisheries area 2009-2013 |
| Virumaa fisheries area | NGO Virumaa Coastal-fishermen Union | Development startegy for NGO Virumaa Coastal-fishermen Union fisheries area 2009-2020 |
| Lake Võrtsjärv fisheries area | Lake Võrtsjärv Fisheries Development Agency | Development startegy for Lake Võrtsjärv fisheries area 2009-2013 |

Source: [Strategies of fisheries areas](#)

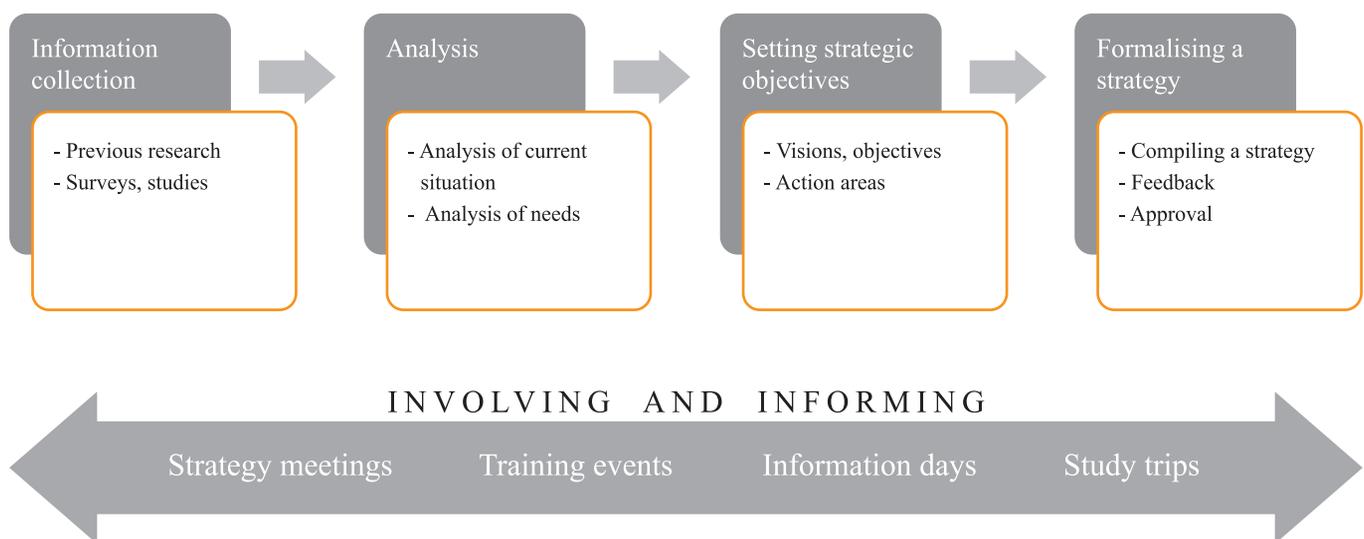
The said action groups include, amongst others, commercial fishers, local governments, fishers' associations, companies in fisheries and other industries, and NGOs active in the fisheries sector that were involved in the development of the strategies via those organisations. In addition to members in these organisations, other organisations or interested parties were involved in the development of a strategy. Some fisheries areas also used the assistance of external consultants to develop their strategies. For instance, the development of the strategy in the Virumaa fisheries area was co-ordinated by a consulting company. Two consultants were involved in the development of the fisheries area strategy for Läänemaa, by assisting in its preparation. The Hiiumaa fisheries area involved consultants in organising strategy meetings, and experts from the non-profit sector were involved throughout the entire process of the compilation of their strategy. In the development of the fisheries area strategy for Harjumaa, assessments by foreign experts were used.



OVERVIEW OF THE COMPILATION OF STRATEGIES

The detailed process of the development of a strategy varied in each fisheries area, but in general it followed common principles. A generalised description of the process of the compilation of the strategies has been presented below Figure 1. The figure indicates that the development of the strategies was a comprehensive and analysis-based process, where action areas were chosen in accordance with the strategic objectives of the areas, which in turn derived from the results of analysis. To perform the analysis, various information sources describing the situation of a fisheries area and its needs were used.

Figure 1. General description of the process of the compilation of strategies



Summary

The strategies were developed by local action groups during the period of 2008-2009. In all fisheries areas, strategies were developed in line with the principles of involvement.

- ▶ The compilation of the strategies was based on the mapped current situation of the fisheries areas. Input included previous studies and existing information, but new studies were also undertaken to collect information on the current situation and needs.
- ▶ In all areas, SWOT analyses of the fisheries areas were carried out, i.e. the strengths, weakness, opportunities, and threats of the areas were identified.
- ▶ The development of a strategy, i.e. analysis of the current situation, developing a vision, and setting goals, was done in co-operation with partners in the fisheries sector (commercial fishers, travel industry involved in fisheries, NGOs in the fisheries sector, LCs, etc). Strategy meetings were held on the principle that people from various areas should be involved.
- ▶ All action groups have published the strategies of fisheries areas on their homepages.

The compilation of the fisheries strategies considered national, county, and local government development documents.



OVERVIEW OF THE CURRENT SITUATION

The strategies of fisheries areas reveal that the biggest problems and needs of the areas are related to the low profitability of the sector, low fish stocks, and the poor condition of the infrastructure. A business model based on the operation of independent fishers and little joint action dominate. This has left fishers in a weak position to sell their fish and has allowed prices to be dictated by buyers of the fish. Inhabitants in the fisheries area perceive problems, and they see a need to take measures against coastal fisheries vanishing.

General profile of fisheries areas

A brief overview of Estonia's fisheries areas is presented below: For each area, a brief description (including area, population and other information comprised in the area) is provided. In addition, based on the descriptions, the particular features of each fisheries area are provided in the strategies. The data presented in the section are based on the strategies of the fisheries areas or the data presented has been submitted by the fisheries areas themselves⁶.

Harjumaa fisheries area



The Harjumaa fisheries area includes the seaside areas of Harjumaa but not the cities of Tallinn and Maardu directly. In 2008, 38,142 people were living in the Harjumaa fisheries area, in addition to the cities of Tallinn (409,661 inhabitants) and Maardu (16,407 inhabitants). Approximately 1,060 are employed in the processing of fisheries products and in aquaculture⁷. There are four micro-businesses engaged in processing fisheries products in the fisheries area; there are opportunities for direct sales at three locations; and three companies provide fisheries-related tourism services. There are approximately 100 ports and landing sites in the area, which is about one-fifth of all fishing ports in Estonia. There are 393 commercial fishers in the area, with an average age of 52. The number of fishers has been declining constantly, mostly due to other, more attractive earning opportunities in the area. In 2008, the volume caught in the area was 239,417 kg. Particular features of the area:

- ▶ The area is advantageously situated with respect to both essential infrastructure and the location of the major markets.
- ▶ Fisheries accounts for only 0.4% of all the industries in the area.
- ▶ Fisheries on the Gulf of Finland are not concentrated in the ports; instead, most of the fishing is distributed through the landing places on the shoreline.
- ▶ Aquaculture in the fisheries area is not developed an extensive degree.
- ▶ Even though there are approximately 100 ports and landing sites situated on the shoreline of Harjumaa, fishers are short of berths (at some ports, port services are too expensive for fishers, the owner may not be interested in fishers; in some ports, problems include a poor condition and a lack of the most basic facilities).

⁶ To collect the information missing in the fisheries strategies, inquiries requesting information were sent to the fisheries areas in May 2020, and this section is based on these. Neither those who compiled nor the party that commissioned the paper have undertaken a separate verification of the submitted data.

⁷ including Tallinn, approximately 1,000, and Maardu, approximately 30.



Hiiumaa fisheries area



There are 10,097 inhabitants in the Hiiumaa fisheries area. Therefore, Hiiumaa is the smallest of the fisheries areas in terms of population. Hiiumaa's coastal waters may be divided into three areas: the relatively closed-off brackish Väinameri, the exposed northern coast, and the sandy and shallow Mardihansu Bay. Commercial fishers in Hiiumaa distinguish seven fishing areas. In 2008, the volume caught in the area was 108,471 kg. In Hiiumaa, there are 67 fishing ports and landing places, and 160 fishing permit holders. The average age of commercial fishers is approximately 48 years. In the Hiiumaa fisheries area, one company engages in fish processing⁸, and two people are employed in aquaculture. More companies are actively engaged in providing fisheries-related tourism services in Hiiumaa than in any other fisheries area – 21 companies. Fresh fish may be purchased at the shops of the Hiiumaa consumer co-operative and AS Hiiumaa Mereagentuur, a sales outlet at Kärddla market, as well as straight off the boat in nine ports. Particular features of the area:

- ▶ 49% of commercial fishers in Hiiumaa belong to a fisheries or business related organisation.
- ▶ In Väinameri, the catch has declined significantly in recent years. Cormorant and seal numbers have increased significantly.
- ▶ On balance, the state of fish stocks is poor (except for some species, such as flounder).

Läänemaa fisheries area



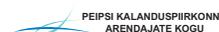
The Läänemaa fisheries area is located in the relatively sparsely populated coastal area of western Estonia. The area comprises eight rural municipalities. As of 1st January 2008, there were 11,298 inhabitants living there. The population is declining in most local government territories, has remained at the same level in two, and is growing slightly in one. As of 2009, there were 177 commercial fishers in Läänemaa, with a average age of approximately 52 years. There are 74 ports and landing sites in the fisheries area. In 2008, the volume caught in the area was 101,623 kg. One micro-business in the fisheries area is engaged in the processing of fisheries products, and employs nine people. Nine companies provide fisheries-related tourism services. There are two stands for direct sales (one in Haapsalu and one in Lihula). Particular features of the area:

- ▶ The area on the whole may be rated a periphery (except for the City of Haapsalu), with many people working outside the area where they live.
- ▶ The area is away from the major highways that pass through Estonia.
- ▶ Läänemaa's ports at Rohuküla and Virtsu provide connections to Saaremaa, Hiiumaa and Vormsi.
- ▶ A significant portion of Läänemaa is protected: along with the limited-conservation areas of NATURA 2000, 29% of the area of Läänemaa is protected. Due to the large number of sites that are subject to nature conservation, more restrictions have been imposed on fishing and movement at sea by fishers in Läänemaa than elsewhere.
- ▶ Fisheries had a relatively large role in the area in the previous century, but it has declined considerably in the past decade.

⁸ As of May 2010, there are no employees



Lake Peipsi fisheries area



The Lake Peipsi fisheries area comprises local government territories in Ida-Virumaa, Jõgevamaa, Tartumaa and Põlvamaa. The fisheries area includes 15 local government territories on Lakes Peipsi, Lämmijärv, and Pihkva as well as six local government territories on lakes in Vooremaa and on the Suur-Emajõgi River. There are 30,723 inhabitants within the territory of the Peipsi fisheries area. As of 2008, there are between 335 and 393 fishers in the area; the population of fishers is on average younger than in the other areas – the average age of commercial fishers is approximately 43 years. In the area, the processing of fisheries products and aquaculture employ 263, and there are 11 micro-businesses engaged in fish processing. There are 72 fishing ports and landing sites in the area. In 2008, the volume caught was 2,089,305 kg, which is one of the highest across the fisheries areas. There are 13 companies engaged in fisheries-related tourism in the area. Opportunities for direct sales include the following: Röpina market, Kolkja sales outlet, Katroni, 3Kuldkala, and Mehikoorma, Kallaste, MIF Laine, Omedu Rand, Vasknarva, Lohusuu and Alajõe ports, in addition to five smoked fish sales outlets. Particular features of the area:

- ▶ The Lake Peipsi fisheries area is rich in cultural heritage. The richness of its cultural heritage is a major tourist attraction, yet to date its offering has not been skilful enough.
- ▶ A major problem is a lack of interest in joint actions. Most land located on bodies of water has been privatised. One is more likely to invest more of one's own money than to co-operate with smaller investors.
- ▶ For ports on Lake Peipsi, a problem is posed by the so-called shifting sand, which requires the construction of expensive and extensive breakwaters for moles or the regular dredging of approaches.
- ▶ There is potential for co-operation with Russia, which would provide a significant opportunity for development (for instance, the beginning of shipping traffic between Estonia and Russia), particularly in regard to tourism.

Pärnumaa fisheries area



The area of operation is located on Pärnu Bay and the Gulf of Riga. As of 1st January 2009, 22,113 people live in the fisheries area of NGO Liivi Lahe Kalanduskogu. The area includes the territories of seven rural municipalities and one city in Pärnumaa. There are 72 ports and landing sites in the area of operation. In the area, there are 353 commercial fishers, with an average age of over 45. In 2008, the volume caught in the area was 11,276,251 kilos, which is highest of all the fisheries areas. The processing of fisheries products and aquaculture employ 390, which is also one of the highest figures across the fisheries areas. Particular features of the area:

- ▶ The operating area of NGO Liivi Lahe Kalanduskogu is well-known as the area richest in fish in Estonia. The Gulf of Riga, comprising Pärnu Bay, is the coastal fisheries area with the highest volume caught in Estonia: In 2008, 89% of Estonia's total coastal catch was caught there.
- ▶ The number of commercial fishers in Estonia accounts for 26.5% of the total number of commercial fishers in Estonia.
- ▶ Pärnumaa has 25% of Estonia's fishing ports and landing sites. Most of these do not have port certificates, with the ports not entered in the register of ports.



- ▶ Pärnu Bay has also been one of the more important areas for perch fishing in Estonia's coastal waters. Pärnu Bay is one of the more significant spawning areas for pike in Estonia's coastal waters.
- ▶ The Pärnumaa operating area is rich in natural recreational resources, providing an opportunity to successfully develop the tourism industry.

Saaremaa fisheries area



In terms of its boundaries, the Saaremaa fisheries area coincides with Saaremaa but does not include the county seat, the City of Kuressaare. In 2008, there were 19,889 inhabitants living in the Saaremaa fisheries area. For 2008, fishing permits were issued for 239 fishers. The average age of commercial fishers is 61, which is highest across the fisheries area. The proportion of those in rural settlement in Saaremaa employed in the primary sector (agriculture, forestry, fisheries) has declined over the past decade, from 23.7% to 14.9%. In 2008, the volume caught in the area was 383,000 kg. Three micro-businesses are engaged in fish processing; fish processing and aquaculture employ 248 people. There are 65 fishing ports and landing sites in the fisheries area. Fisheries-related tourism services are provided by five companies. There are direct sales at the consumer co-operative shops, fishmongers' shops, large shopping centres, and in the ports. Particular features of the area:

- ▶ Saaremaa is one of the leading tourism areas in Estonia – it is 4th in terms of the total number of visitors, yet it is the county with the most visitors in proportion to its population.
- ▶ As a field of endeavour, coastal fisheries have commanded an important place in Saaremaa for centuries.
- ▶ In the past decade, volumes caught in coastal fisheries in the Saaremaa fisheries area have been constantly declining.
- ▶ At the same time, coastal fishing remains a socially significant livelihood in rural areas in Saaremaa where the number of livelihoods is rather limited.
- ▶ Coastal fishing is made more difficult by the constantly increasing numbers of grey seals, which break fishers' traps. In Väinameri, a significant increase in the numbers of the cormorant, a natural enemy of coastal fish, has hindered the recovery of fish stocks.

Virumaa fisheries area

The fisheries area comprises the territories of nine local governments (seven rural municipalities and two cities) in Lääne-Virumaa and Ida-Virumaa along the north coast of Estonia and the downstream and middle left bank of the River Narva at Estonia's eastern border. In Ida-Virumaa, the location is near economic and population centres, i.e. major cities such as Kohtla-Järve, Jõhvi, Sillamäe, and Narva. There are no major cities near the coast in Lääne-Virumaa; instead, there is more of an orientation towards holiday makers and tourists. There are 18,158 inhabitants in the area of operation, and the population is declining and aging. There are 239 commercial fishers in the fisheries area, with an average age of approximately 58. There are 50 ports and landing sites in the area. In 2008, the volume caught was 587,300 kg. No fisheries-related tourism services are provided in the fisheries area⁹; four micro-businesses engage in fisheries product processing. For direct sales, there is a mobile fish truck in rural areas and there are town markets in Rakvere, Narva-Jõesuu, and Kunda.

⁹ As at May 2010



Particular features of the area:

- ▶ There are a number of ports and landing sites on the Virumaa coast, but most of these are outmoded, with none of the up-to-date equipment that is required to service fishing.
- ▶ The activity of the third sector is rather modest. In broader maritime issues, local governments have been active in recent years.
- ▶ In the fisheries area, aquaculture is not engaged in.
- ▶ Fish stocks have declined.

Lake Võrtsjärv fisheries area



MTÜ Võrtsjärve Kalanduspiirkond

Lake Võrtsjärv is the largest inland body of water in Estonia. The Lake Võrtsjärv fisheries area includes the territories of nine rural municipalities in three counties (Tartumaa, Viljandimaa and Valgamaa). As of 1st April 2008, there were 41 holders of fishers' fishing permits and assistant fishers (including one fish farmer) operating in the Lake Võrtsjärv fisheries area, with an average age of 51. In total, there were 18,000 inhabitants in the fisheries area. There are 33 ports and landing sites in the fisheries area, the fewest across the fisheries areas (accounting for 6% of all fishing ports). One micro-business in the area engages in fish processing, and fisheries-related tourism services are provided by 10 companies. Five are employed in fisheries product processing and aquaculture. In 2009, the volume caught in the area was 338,000 kilos. There are direct sales at Viljandi market. Particular features of the area:

- ▶ In terms of the fisheries industry, Lake Võrtsjärv is a distinctive body of water where, next to naturally occurring species of fish, eel is of high importance, and large amounts are invested annually in the preservation of its stocks.
- ▶ Various requirements related to the protection of Lake Võrtsjärv play an important role when activities related to Lake Võrtsjärv are planned and implemented. The most extensive of these is the Natura 2000 limited-conservation area.
- ▶ According to official data (port register), as of December 2008, there are no compliant ports or landing sites on Lake Võrtsjärv that conform to the requirements.





Main problems and needs of the fisheries areas

Below, a description is provided of the biggest problems and needs of the fisheries areas that emerged from their strategies.

Poor condition of the fisheries infrastructure

All of the fisheries areas perceive a need for investments to be made in the improvement of the state of infrastructure and physical facilities (ports with their fixtures, fishing gear, boats and processing equipment).

If in general, there are ports and landing sites (except for the Lake Võrtsjärv fisheries area, where as of 2008 there were no ports or landing sites that would conform to requirements), all of the fisheries areas cite their poor technical condition as a problem. The poor state of ports and landing sites is one of the biggest problems in all of the fisheries areas. A large number of ports do not meet the requirements in the Ports Act and maritime safety criteria.

It becomes apparent from the strategies that access to the sea (ports, landing places, slips, and roads providing access to these) is outmoded and that at ports there are often no port structures and infrastructure belonging with them (water, electricity, fuel, sewage, security, facilities for the initial processing of fish), or these are available only in part. In many parts, there is no fish processing equipment (cold-storage houses, cooler houses, other chilling equipment, trucks/containers equipped for cooling, ice-making machines, smoking ovens, gutting houses), or it is outmoded. In ports, there are no facilities for repairing, maintaining, or storing fishing boats and fishing gear. Fishers' boats are old and in poor condition.

The main reason for the failure of the implementation of the required development activities is a shortage of funds. At the same time, in some areas problems are also posed by complex ownership relations, conflicts between fishers, business operators, and the local population, which hinder co-operation in developing the infrastructure. This is a problem in the Saaremaa fisheries area, for instance. According to the strategy for the Lake Võrtsjärv area, there is there a conflict of interests amongst co-owners, as a result of which it is difficult to reach agreements in order to operate. The fisheries strategy for Pärnumaa indicates that in many ports the port area is divided amongst several owners, which makes it more difficult to invest in the port infrastructure.

Inadequate facilities for small-scale processing and direct sales of fish

There is little fish processing in fisheries areas. This is due to the fact that there are no up-to-date production facilities, production equipment or lines, freezing or cooling equipment, packaging lines, or people with current knowledge of production technology to match the needs of small companies. Sales methods in coastal fisheries are led by fresh unprocessed fish and direct sales via personal contacts. Bigger quantities of fresh fish are sold directly to first buyers or the fish processing industry, which dictate the price of fish based on the supply and demand at the time, as fishers have no facilities for the long-term storage of fresh fish. This has brought about a situation where buying-in prices are low, fishers' incomes are low and unstable, and due to the seasonality of fishing, there are periods during the year when fishers have no income. The low profitability of fisheries, however, results in a constant decrease in the number of fishers and, connected to that, a drain of significant know-how. This is indicated in their strategies by the Saaremaa, Läänemaa, Harjumaa, and Lake Peipsi fisheries areas.



Added value to fish and the better organisation of its sales would allow fishers' incomes to increase with present volumes. Adding value to fish requires the acquisition of equipment and know-how. Creating conditions for storing and processing fish would help to reduce seasonality, while also increasing the income of fishers and business operators in a area and ensure that visitors to the area have the opportunity to share in the catch year-round. Consequently, it is necessary to introduce small-scale initial processing of fish locally and the joint direct sales of fisheries and aquaculture products to the end consumer. In coastal fisheries, it would be expedient to set up their own micro-industry aimed at direct sales and generating flexibility. It is important to consider joint action by fishers, which would allow logistics and distribution costs to be reduced, as well as co-operation with tourism operators.

Fishers' low incomes

For most fishers, fishing is a side or supplementary occupation in addition to a main occupation. The number of fishers who make a living out of fishing is small, and there is a need for supplementary occupation to ensure incomes. For instance, for 80% of fishers in Läänemaa, income from fishing accounts for less than 30% of their total income. Only for 8% of fishers, revenue from fishing accounts for more than 50% of their total income. According to the fisheries area strategy for Saaremaa, the proportion of fishers who make a living solely out of fishing is only 3-10% of the total population of fishers. For the preservation of coastal culture and fishing traditions, it is important that fishers find other opportunities near their homes to earn an income. Fishers make a supplementary income by providing, for instance, tourism services, hand-crafted and industrial products, and other such items. A conscious introduction of such a diverse economic model would contribute to ensuring the sustainability of coastal fisheries and coastal villages. In addition, this makes it possible to diversify the economic structure in the area, to reduce risks resulting from the seasonality of fishing, and to generate additional revenue for the area.

Little joint action

In coastal fisheries, a business model based on the operation of independent fishers and little joint action dominate. This has left fishers in a weak position to sell their fish and has allowed prices to be dictated by buyers of the fish. On the other hand, the scattered population of fishers poses a difficulty for investments. In fisheries areas, there is a situation where buying-in prices and fishers' income are low, as a result of which fishers are forced to look for alternative sources of income, and the population of fishers is aging, as the sector is not attractive to young people because of the low income. Fisheries areas perceive an urgent need to increase joint action. Joint action would ensure better market and price information, allowing the catch to be sold at the right time in the right place, i.e. to get a honest and fair price for fish and reduce price fluctuations. In the area, there is a need for its own buying-in system and for adding value to fish.

The need for joint action is also related to investments. The investment capability of an independent fisher is significantly lower than that of a group of fishers. Due to fishers' low income and there being no joint action, much-needed investments fail to be made in fish processing, product development, distribution, etc. Major investments presuppose co-operation. An association-based operation provides the opportunity to participate in joint procurement, and allows fisher to make significant savings when making investments. A higher degree of organisation is also presupposed by the need to initiate constructive dialogue in order to devise national regulations on fisheries that consider the local circumstances. In terms of the main needs for co-operation, the strategies indicate co-operation for joint procurement, joint administration of co-operation/joint action, local co-operation, co-operation within a area, co-operation between areas, international co-operation, i.e. multi-level co-operation on action areas, co-operation between sectors (e.g. with LEADER), co-operation to identify and agree on needs, representing interests jointly, and financing co-operation and obtaining funding.



Untapped tourism potential of coastal villages

In their strategies, fisheries areas indicate that the areas have the prerequisites for developing tourism. There are traditional coastal villages with interesting history and cultural heritage as well as beautiful scenery. Mostly, areas also have tourism products and a network of tourism services. At the same time, it is thought that the tourism potential of coastal villages has largely yet to be tapped. A characteristic feature is a predominantly low degree of organisation; alternative tourism activities have not been addressed enough. The fisheries area strategy for Saaremaa indicates, for instance, that there are few places that provide an opportunity to go on a boat ride for pleasure at sea, sample freshly cooked local fish, or simply spend time in the setting of a coastal village. The Pärnumaa fisheries area cites a lack of effective co-operation as a problem between operators in the fisheries sector, tourism companies, and operators involved in farm tourism, as a result of which tourism products have also not been rolled out in the fisheries sector. Consequently, closer co-operation is needed between coastal fishers and tourism operators for fisheries-related tourism to evolve into a major source of additional income for fishers. Tourism in coastal villages in turn is closely related to regenerating and developing coastal villages and improving living conditions there, which depends on the local community. Many coastal villages have declining populations and a shortage of young permanent residents. To avoid the aging of the population of fishers and the extinction of traditions, new options should be found to improve the popularity of the occupation of a fisher and thereby limit the stream of the departing youth. Options should be found to regenerate and develop the area and improve its attractiveness.

Lack of knowledge required to implement the action areas of a strategy

Implementing the action areas of a strategy presupposes the availability of human resources that have the knowledge and know-how required for this. Fisheries areas indicate in their strategies that coastal fishers lack the knowledge to provide fish processing and tourism services; there is also a shortage of skills in project management and project drafting, and advice is also needed on the diversification of activities. The fisheries area strategy for Pärnumaa indicates that to date coastal fishers have been unable to explore enough experience from foreign countries, or to see for themselves what a coastal village with modern infrastructure or a fish market etc look like. Experience is required to develop and implement logistics systems and to launch a distribution chain. The Saaremaa fisheries area indicates amongst other things fishers' limited foreign language skills, which is a weakness in regard to the involvement in fisheries-related tourism. To acquire all of these skills, an emphasis on further training and retraining is very important. Project preparation and management skills are important to fund training activities, and they are also important in finding opportunities to fund additional activities based on various programmes and measures outside of the fisheries sector.





Summary

Estonia is divided into eight fisheries areas. The Harjumaa, Hiiumaa, Läänemaa, Pärnumaa, Saaremaa, and Virumaa fisheries areas operate in the seaside areas (Väinameri, Gulf of Riga and Gulf of Finland). The Lake Peipsi and Lake Võrtsjärv fisheries areas operate on inland bodies of water.

In all fisheries areas, local fisheries action groups operate, contributing to the development of the areas and providing a good basis to implement joint action between fishers, business operators, and local governments.

Overview of the current situation in coastal fisheries

There are a total of about 170,000 living in Estonia's fisheries areas, with the Harjumaa fisheries area being the biggest and the Hiiumaa fisheries area the smallest in terms of population. More than 1,900 people engage in commercial fishing in the fisheries areas. The majority of fishers operate in the Harjumaa, Pärnumaa, and Lake Peipsi fisheries areas, and the fewest in the Lake Võrtsjärv fisheries area. Fisheries areas feature a long-standing fisheries tradition, but the population of fishers is aging, with the sector receiving few young people. The average age of fishers is 51.

For most fishers, fishing is a side or supplementary occupation besides some other main occupation. The number of fishers making a living out of fishing only is small, and there is a need for supplementary activities to ensure incomes, as a result of which it is important to support projects concerned with the diversification of activities.

There are more than 530 fishing ports and landing sites in the fisheries areas, yet their poor technical condition is problematic. This is one of the biggest problems in all fisheries areas, as a result of which a need is seen for investments to renew ports and landing sites.

Fish processing is not widely engaged in fisheries areas, micro-business engaged in fish processing amount to 25 in the areas (11 of these in the Lake Peipsi fisheries area). Sales methods in coastal fisheries are led by fresh unprocessed fish and direct sales via personal contacts. Bigger quantities of fresh fish are sold directly to first buyers or the fish processing industry, which dictate the price of fish based on the supply and demand at the time, as fishers have no facilities for the long-term storage of fresh fish. This has brought about a situation where buying-in prices are low, and fishers' incomes are low and unstable. To increase fishers' incomes, facilities need to be created for processing and distributing fish.

The areas have good tourism potential. There are historical coastal villages and a surviving maritime heritage, which may be exploited for the purposes of tourism. At the same time, fisheries areas have not tapped into their tourism potential. By developing fisheries-related tourism and regenerating and developing coastal villages, it is hoped, by better exploiting the tourism potential, to make possible alternative operating opportunities for fishers, tourism operators, and other local residents, thereby increasing incomes in the area.

A business model based on the operation of independent fishers and little joint action dominate. This has left fishers in a weak position to sell their fish and has allowed prices to be dictated by buyers of the fish. On the other hand, the scattered population of fishers poses a difficulty for investments. Consequently, fisheries areas perceive an urgent need to increase joint action.



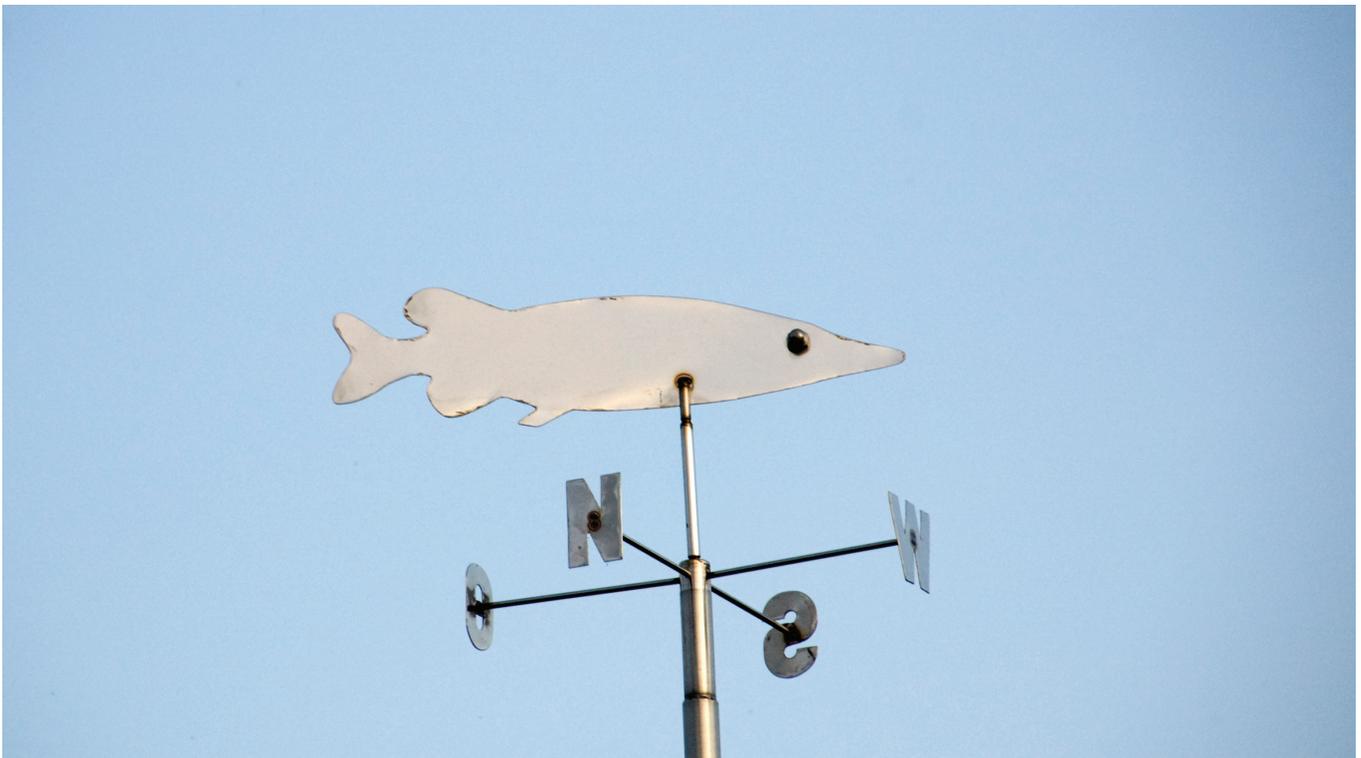
OVERVIEW OF THE CURRENT SITUATION

Summary

In brief, the problems include the following:

- ▶ The poor technical condition of fisheries infrastructure – a need to renew fishing ports and landing sites.
- ▶ Inadequate facilities for small-scale fish processing – it is necessary to support the processing and direct sales of fisheries products.
- ▶ Fishing does not guarantee an income for fishers – a need to support the diversification of activities.
- ▶ Little joint action – a need to increase joint action.
- ▶ Coastal villages' tourism potential is largely untapped – a need to develop fisheries-related tourism and support the regeneration and development of coastal villages.
- ▶ Lack of knowledge required to implement the action areas of a strategy – a need for training activities.

Emphases in strategies on supported activities also flow from the said problems.





DEVELOPMENT VISIONS AND OBJECTIVES

A vision must answer the question, “Where are we headed?” or what is the success we are seeking in the long term. A vision must present a challenge and give people the chance to achieve their objectives.¹⁰ The strategies of all of the fisheries areas define their visions and objectives.

Overview of visions for the fisheries areas

Below, excerpts are provided from the visions indicated in the strategies for Estonia’s fisheries areas.

Harjumaa fisheries area vision 2020

- ▶ The Harjumaa fisheries area is a viable community that exploits its area’s advantage on the market. Fishers use the fish stocks sustainably, by catching and selling only quality fresh fish. The inhabitants of the coastal area add value to marine products and continue the traditions and legends of coastal villages.
- ▶ Inhabitants in the coastal villages of Harjumaa carry on the continuity and enduring values of coastal villages. Combining heritage culture with numerous investments in modern maritime economy, fisheries, fish farming, and recreational industry has proven a success. The occupation of a fisher is thought of highly, and fish is a recognised food available to all.

Hiiumaa fisheries area vision 2013

- ▶ By 2013, Hiiumaa has evolved into an island that supports the traditions of coastal fisheries, with infrastructure and services, and diverse entrepreneurship that provides supplementary employment opportunities for coastal fishers.
- ▶ The infrastructure and services in ports support the sustainable use of the existing fish resources. Much of the caught fish is used to make products for own use with high added value and to provide catering for tourists. Buying in, storing, processing, and selling fish occur through co-operation amongst the fishers.
- ▶ On the coastal fishers’ initiative, there are various micro-businesses based predominantly on local resources and know-how to distribute products and services in Hiiumaa, Estonia, and the Baltic Sea area.
- ▶ The coastal waters and small islands of Hiiumaa have become a well-known summer destination for those engaged in maritime and fisheries-related tourism, offering recreation for kayak and canoe tourists, yachtsmen, recreational fishers, and bird watchers.
- ▶ Co-operation and joint development activities amongst Hiiumaa’s coastal fishers feature co-operative contacts in Hiiumaa, Estonia, and the Baltic Sea area, a forward-thinking outlook, and a contemporary organisation and information dissemination setup.

Läänemaa fisheries area vision 2020

- ▶ In the coastal villages of the Läänemaa fisheries area, traditional activities and lifestyles have been preserved. Coastal fishers have successors. There is functioning fisheries-related entrepreneurship, including tourism.

¹⁰ See http://www.fin.ee/failid/SP_kasiraamat_2006_030206.doc. Last viewed 28 February 2009.



DEVELOPMENT VISIONS AND OBJECTIVES

- ▶ An adequate network of small ports and landing places together with the necessary infrastructure has been developed. There is good access to the sea and to the land from the sea. Small ports of regional significance serve diverse purposes.
- ▶ Coastal fishers have boats that meet maritime safety criteria for fishing and can provide services to tourists, and they have up-to-date navigational instruments and the skills to operate them.
- ▶ Value is added locally to fish caught in the area, and fishers' incomes are not declining. There is a functioning regional distribution system.
- ▶ Coastal fishers, local governments, and village communities cooperate in diverse ways to more effectively exploit the assets and opportunities in the area.
- ▶ By joint actions, input is given on the development of legislation and restrictions in order to protect fish stocks and to ensure reasonable fishing opportunities for fishers.
- ▶ Jointly, assistance is provided to organise and monitor legislative compliance in the area.
- ▶ Through the joint efforts of researchers, nature and environmental conservationists, coastal fishers, local governments, and communities in the area, a contribution is made to the preservation and improvement of fish stocks.

Saaremaa fisheries area vision 2020

- ▶ The Saaremaa fisheries area is a viable community. The inhabitants of Saaremaa, together with an abundant part-time population, carry on the continuity and enduring values of coastal villages. Combining heritage culture with numerous investments in modern maritime economy (ship building), fisheries, fish farming, and the recreational industry has proven a success. The occupation of a fisher is thought of highly, and fish is a recognised food available to all.

Peipsi fisheries area vision 2015

- ▶ PEIPSI UNITED – Lake Peipsi is a sustainably developing fisheries area with distinctive and interesting cultures where a local is happy to live and work.
- ▶ To implement sustainable fisheries principles, fishing ports that meet the requirements have been rolled out together with the infrastructure that belongs with them in the Lake Peipsi fisheries area.
- ▶ Business operators in the Lake Peipsi fisheries area add value to fish in the largest quantity possible and engage in joint sales activities to sell it.
- ▶ Fisheries-related tourism operators with a high-level of new product packages and who offer new product packages operate in the area. Joint projects are completed to develop tourism in the area, encompassing all of Lake Peipsi. The area has a strong identity in the form of well-known brands – the lake, fish, onions, beautiful scenery and more – that we use actively and know how to derive benefits from.
- ▶ Development Association of Peipsi Fishery area is a sustainable development organisation and a reliable partner with which to work.



Pärnumaa fisheries area vision 2013

- ▶ By 2013, coastal life in Pärnumaa has been made attractive and sustainable, with companies in the area providing various services to both local residents and tourists.

Virumaa fisheries area vision

- ▶ The Virumaa fisheries area is a community of fishing villages that are viable, value traditions, have an open-minded attitude, and are co-operative.
- ▶ It features a clean environment, strong infrastructure, well-organised fisheries and security.

Lake Võrtsjärv fisheries area vision 2013

- ▶ The state of fish stocks is stable, with restocking with pre-farmed eel at a minimum volume of 350,000 annually.
- ▶ In the area, there is at least one successful and recognised business operator that engages in adding value to fish, and thanks to fish processing, fishers' incomes have increased by at least 20%.
- ▶ There is a functioning co-operation network between fishers, business operators, and inhabitants in the area (via Lake Võrtsjärv Fisheries Development Agency) to help ensure the sustainable development of the fisheries area.
- ▶ Annually, there is held at least one event of Estonia-wide significance concerned with keeping fishers' traditions alive in coastal villages and with providing information on the Lake Võrtsjärv fisheries area to its visitors.
- ▶ Fisheries-related tourism packages for exploring fishers' traditions attract additional visitors to the area year-round, with the number of visitors having increased by 2013 at least 20%.
- ▶ In the area, there is at least one small port that conforms to the requirements of the Ports Act, thanks to which necessary services can be provided to both tourists and fishers. As a result of studies that have been conducted, an action plan to develop ports on Lake Võrtsjärv has been completed.





Comparison of visions

All fisheries areas have defined a vision or a concept in their strategies of what they wish to be like in the future. Visions of fisheries areas overlap to a large extent and are closely related to the action areas of the measure for the sustainable development of fisheries areas, where all of the fisheries strategies operate.

Fisheries areas have chosen varying time-frames for their visions. The Läänemaa, Saaremaa, Virumaa, and Harjumaa fisheries areas have formulated their visions to 2020. The Lake Peipsi fisheries area formulates its vision to 2015, and the Hiiumaa, Pärnumaa and Lake Võrtsjärv fisheries areas to 2013.

Overlaps between and particular features of visions

The vision for the fisheries areas is to be a viable fisheries area where the traditions of coastal fisheries have been preserved and where sustainable fisheries principles are being implemented. The visions indicated in the strategies of fisheries areas contain largely similar components. The visions of the fisheries areas may be summarised as follows:

The main elements in visions that are indicated in all strategies and that shape the operation of fisheries areas are as follows:

- ▶ Sustainability and the viable development of the areas
- ▶ Preservation of traditions and culture in the areas
- ▶ Fishers' joint action and co-operation with local residents, local governments and business operators

In addition, the Lake Peipsi, Võrtsjärv, Läänemaa and Hiiumaa fisheries areas emphasise in their visions the role of the fisheries action group as a guarantor for the sustainable development of an area. The fisheries area strategy for Läänemaa indicates the objectives of protecting fish stocks in its vision, based on the large number of conservation areas characteristic of the area. An important component in the vision for the Lake Võrtsjärv fisheries area is, unlike the other fisheries areas, the eel fishing industry.

In brief, it may be said that the visions for the fisheries areas combine development and the preservation of traditions. On the one hand, there is seen a need to develop fisheries areas (by improving infrastructure, promoting entrepreneurship), where the key issue is joint action and co-operation with all the parties involved.

On the other hand, there is seen a need to preserve the distinctive culture of coastal villages and fishers' traditions. In accomplishing their visions, fisheries areas perceive an important role for fisheries action groups, whose purpose is to contribute to the accomplishment of the visions.

Sustainability and the viable development of areas

All fisheries areas indicate in their strategies that their vision is to ensure the Sustainability and viable development of the areas. This means that on the one hand there is a desire to establish or update the fisheries infrastructure and services in an area. On the other hand, Sustainability and viable development refers to ensuring the adding of value to fish and the functioning of the distribution system in a fisheries area.



In terms of ensuring the sustainability of a area, strategies emphasise the availability of opportunities to use fish resources sustainably and ensure a fair income for coastal fishers. An important component in ensuring the sustainability of areas is seen in fisheries-related entrepreneurship, which provides fishers with additional employment opportunities.

In connection with entrepreneurship, visions indicate exploiting tourism potential most. Objectives related to the development of entrepreneurship in tourism are included in the visions for the Hiiumaa, Läänemaa, Saaremaa, Lake Peipsi, Pärnumaa, and Lake Võrtsjärv fisheries areas.

Unlike the other fisheries areas, the vision for the Harjumaa fisheries area only places emphasis on ensuring the catching and sales of quality fish in terms of the sustainable use of fish stocks. In the vision for the Virumaa fisheries area, one element in the sustainable community is ensuring security.

Preservation of traditions and culture in the areas

Besides the development of a area, all fisheries areas indicate a need to preserve the distinctive culture of coastal villages and fishers' traditions in their strategies. On the one hand, this includes keeping alive the traditional lifestyle by both giving value to the occupation of a fisher and preserving social and environmental values. On the other hand, providing information about it by providing tourism services and by means of events that provide information on a area.

Exploiting the identity of a fisheries area as a competitive advantage is emphasised more in the vision for the Lake Peipsi fisheries area, where the active use of the combined effect of well-known brands (lake, fish, onions, beautiful scenery) is indicated for deriving benefit for the area.

Fishers' joint action and co-operation with partners in the fisheries sector

Fisheries areas recognise the need for joint action and co-operation among fishers, local governments, business operators, and activists in the fisheries sector. Co-operation is considered necessary for buying, storing, processing, and selling fish. On the other hand, a need is seen for extensive co-operation between coastal fishers, local governments, business operators, and village communities to develop areas and better exploit opportunities.

Unlike the other areas, the Hiiumaa fisheries area cites in its vision the creation of co-operation contacts Estonia-wide and across the entire Baltic Sea area in addition to joint action within the area.

Ensuring the sustainability of an action group

Lake Peipsi, Lake Võrtsjärv, Hiiumaa and Läänemaa fisheries areas

In addition to the above vision elements, some strategies of fisheries areas also indicate the need for the development of a fisheries action group as an organisation. For instance, the vision for the Lake Peipsi fisheries area provides that the Development Association of Peipsi Fishery area is a sustainable development organisation and a reliable partner with which to work. Developing an organisation is also included in the visions for the Hiiumaa, Lake Võrtsjärv and Läänemaa fisheries areas.

Co-operation to protect fish stocks

Läänemaa fisheries area

Unlike the other fisheries areas, the Läänemaa fisheries area emphasises protection aspects in its vision.



The vision for the fisheries area is co-operation between various partners in the fisheries sector in order to ensure the preservation and improvement of fish stocks, including co-operation to exert an influence on the development of legislation and restrictions, to ensure the protection of fish stocks and reasonable fishing opportunities for fishers. There is also a desire to implement joint action for the monitoring of legislative compliance in the area. The emphasis on the protection of fish stocks in the vision for the Läänemaa fisheries area is justified by the fact that a significant portion of Läänemaa is protected: together with the limited-conservation areas of NATURA 2000, 29% of the area of Läänemaa is protected. Due to the large number of sites subject to nature conservation, more restrictions have been imposed on fishing and movement at sea by fishers in Läänemaa than elsewhere.

Restocking of pre-farmed eel

Lake Võrtsjärv fisheries area

An important component in the vision for the Lake Võrtsjärv fisheries area is, unlike the other fisheries areas, the eel fishing industry. The state of fish stocks is stable, with restocking with pre-farmed eel at a volume of 350 000 at least, annually. This vision is justified by the fact that the importance of the eel fishing industry in the Lake Võrtsjärv fisheries area is considered significant. The eel fishing industry is one of the action areas in the strategy for the Lake Võrtsjärv fisheries area, the objective of which is to achieve stability in terms of restocked eel volumes.

Summary

A vision is an idea of what is desired as a goal, i.e. the kind of success that is sought in the longer perspective. The vision for the fisheries areas is to be a viable fisheries area where the traditions of coastal fisheries have been preserved and where sustainable fisheries principles are being implemented. Visions for all fisheries areas include the following:

- ▶ Ensuring the Sustainability and viable development of areas – this refers to renewing the fisheries infrastructure and services in a area, ensuring the addition of value to fish, and the functioning of the distribution system in a fisheries area.
- ▶ Preserving the distinctive culture and fishers' traditions in coastal villages – for this, it is considered necessary to keep alive the traditional lifestyle (both by giving value to the occupation of a fisher and preserving social and environmental values) and to provide information about it by developing tourism services and by means of events that provide information on a area.
- ▶ Joint action and co-operation among fishers, local governments, business operators, and activists in the fisheries sector – co-operation is considered necessary for buying, storing, processing and selling fish. On the other hand, a need is seen for comprehensive co-operation between coastal fishers, local governments, business operators, and village communities to develop areas and exploit opportunities more effectively.

Differences: The vision for the Lake Peipsi, Võrtsjärv, Läänemaa and Hiiumaa fisheries areas is to develop the fisheries action group as an organisation. The vision for the Läänemaa fisheries area includes the objectives of protecting fish stocks. Unlike the other fisheries areas, the vision for the Lake Võrtsjärv fisheries area also addresses the eel fishing industry.



ACTION AREAS AND OBJECTIVES

According to their strategies, all of the fisheries areas are engaged in the following action areas to accomplish their visions:

- ▶ Renewal of fishing ports and landing sites
- ▶ Processing and direct sales of fisheries products
- ▶ Regenerating and developing fisheries-related tourism and coastal villages
- ▶ Diversification of activities
- ▶ Training activities

In brief, fisheries areas have chosen these action areas because the renewal of fishing ports and landing sites is an important prerequisite for ensuring the sustainability of fisheries in the areas, and this flows from the problem identified by the mapping of the current situation – the fact that ports and landing sites are in a substandard condition. The processing and direct sales of fisheries products, the development of fisheries-related tourism and the regeneration and development of coastal villages, and the diversification of activities are action areas the implementation of which is mainly caused by increasing incomes in the area. These action areas relate directly to the problem that activities in the fisheries sector are of low profitability, which poses a threat to the sustainability of this sector. Training activities support all of the strategic action areas and contribute to the acquisition of knowledge required for the accomplishment of the objectives. Below, objectives and activities, including justifications for action areas described, are provided by action area.

Renewal of fishing ports and landing sites

All of the fisheries areas have chosen the modernisation of fishing ports and landing sites as one of their action areas. Below, a description is provided of what prompted a need for the implementation of this action area, what the objectives of the fisheries areas are in terms of the renewal of fishing ports and landing sites, and what the planned activities are.

Need for implementing the action area

The renewal of fishing ports and landing sites has been indicated as one important action area because in all of the fisheries areas the technical condition of ports and landing sites is substandard. A large number of ports do not meet the requirements in the Ports Act and maritime safety criteria (including, for instance, the Lake Võrtsjärv fisheries area, which as of 2008 has no port or Landing site that meets the requirements). Also, facilities for the initial storage of fish are inadequate; many ports have no repair facilities or facilities for storing traps and fishing gear. The strategies of fisheries areas for Saaremaa and Hiiumaa also indicate, for instance, the lack of necessary electricity and water supply at many ports. The main reason for the stalling of the completion of the construction of ports and Landing site is the shortage of funds. At the same time, access to the sea from land and to land from the sea is a top priority in terms of maritime operations. The development of sustainable fisheries requires the development of a network of small ports where all of the ports meet the maritime safety and food hygiene requirements and where the necessary conditions have been created for the berthing of fishing boats, and the landing and initial processing of fish. According to the fisheries strategies, a well-maintained small port will benefit several other industries in addition to fisheries. The strategies state that a rolled-out network of small ports is essential for the development of the entire maritime economy.



ACTION AREAS AND OBJECTIVES

A small port that meets the needs of all users increases the competitiveness of a area and serves as an engine for the development of a coastal village, by improving the living standard and living environment in the sector.

Objectives for the action area

The objective of this action area is to ensure the availability of ports and landing sites that meet the requirements and the needs of a area. For this, investments in the infrastructure of ports and landing sites are planned. The Lake Võrtsjärv fisheries area has set the objective of conducting surveys to map the condition of and need for ports and landing sites. Specific objectives and targets of fisheries areas in the action area of renewing fishing ports and landing sites have been described in the table below.

| AREA | OBJECTIVE | TARGET |
|-------------|--|--|
| Harjumaa | Small ports and landing sites in Harjumaa meet the needs of both fishers and other stakeholders. | <ul style="list-style-type: none"> ▶ At ports and landing sites, there are modern facilities that meet the requirements for servicing fishers, and all of the renewed ports have been entered in the port register. |
| Hiiumaa | The infrastructure and services in ports support the sustainable use of the existing fish resources. | <ul style="list-style-type: none"> ▶ By 2015, a network of fishing ports has been rolled out, offering support services guided by the regional specifics and the needs of coastal fisheries. ▶ By 2015, ports will meet the requirements imposed by the Ports Act. |
| Läänemaa | In the Läänemaa fisheries area, an adequate network of small ports and landing places together with the necessary infrastructure have been developed. There is good access to the sea and to the land from the sea. Small ports of regional significance serve diverse purposes. | <ul style="list-style-type: none"> ▶ By 2015, there are 7 well-maintained main ports. ▶ Ports have a well-maintained infrastructure and the provision of main services. ▶ The administration of ports has been organised. ▶ Ports are developed on a priority basis if they have a higher co-operation potential and can ensure the comprehensiveness of services provided to which the most stakeholders are linked. ▶ The network of ports ensures fishers in Läänemaa have access to important fishing areas within a reasonable time period. ▶ Ports have been developed in places where coastal inhabitants meet. |
| Lake Peipsi | The objective of the action area of developing ports and landing sites is to roll out an optimal network of ports and landing sites that meet the requirements, are guided by the particular features of Lake Peipsi, and are historically justified. | <ul style="list-style-type: none"> ▶ Renovating 11-14 ports in the area is optimal. ▶ To stem shifting sands, breakwaters for moles have to be built or regular dredging has to be undertaken. ▶ Operation of a dredger acquired for the approaches to the ports via a non-profit organisation in accordance with good practices for joint works. |



| AREA | OBJECTIVE | TARGET |
|----------------|---|--|
| Pärnumaa | Improvement of facilities for the initial handling of fish and for the processing of fish; establishment of fisheries logistics centres and bases for the direct sales of fish at all chosen Landing sites to ensure the quality of fish. | <ul style="list-style-type: none"> By 2013, in the area of operation of NGO Liivi Lahe Kalanduskogu, there seven fisheries logistics centres that meet the requirements have been renovated. |
| Saaremaa | In Saaremaa, there are small ports and landing sites that meet the needs of both fishers and other stakeholders. | <ul style="list-style-type: none"> At a minimum of 6 ports and landing sites modern facilities that meet the requirements for servicing fishers have been created, and all of the renewed ports have been entered in the port register. |
| Virumaa | <p>In each active fishing village (where commercial fishers operate), there is a duly equipped and maintained port or Landing site with good access facilities.</p> <p>The availability of technical facilities for fishing vessels and equipment has been ensured in the fisheries area.</p> | <ul style="list-style-type: none"> At least 10 ports and landing sites have been renewed (by 2013). 4 surveys on the needs and technical condition of the infrastructure of ports and landing sites have been conducted (by 2018). 4 surveys on the availability and compliance of the technical facilities of fishing vessels and fishing gear have been conducted (by 2018). |
| Lake Võrtsjärv | Renewal of fishing ports and landing sites. | <ul style="list-style-type: none"> By 2013, under the leadership of NGO Võrtsjärv Kalanduspiirkond, a survey has been conducted to identify the problems and needs related to landing and landing sites and to propose the optimal solution for the Lake Võrtsjärv area, including a specific action plan for their development. By 2013, in the Lake Võrtsjärv fisheries area, there is at least one small port that meets the requirements in the Ports Act. |

Activities supported

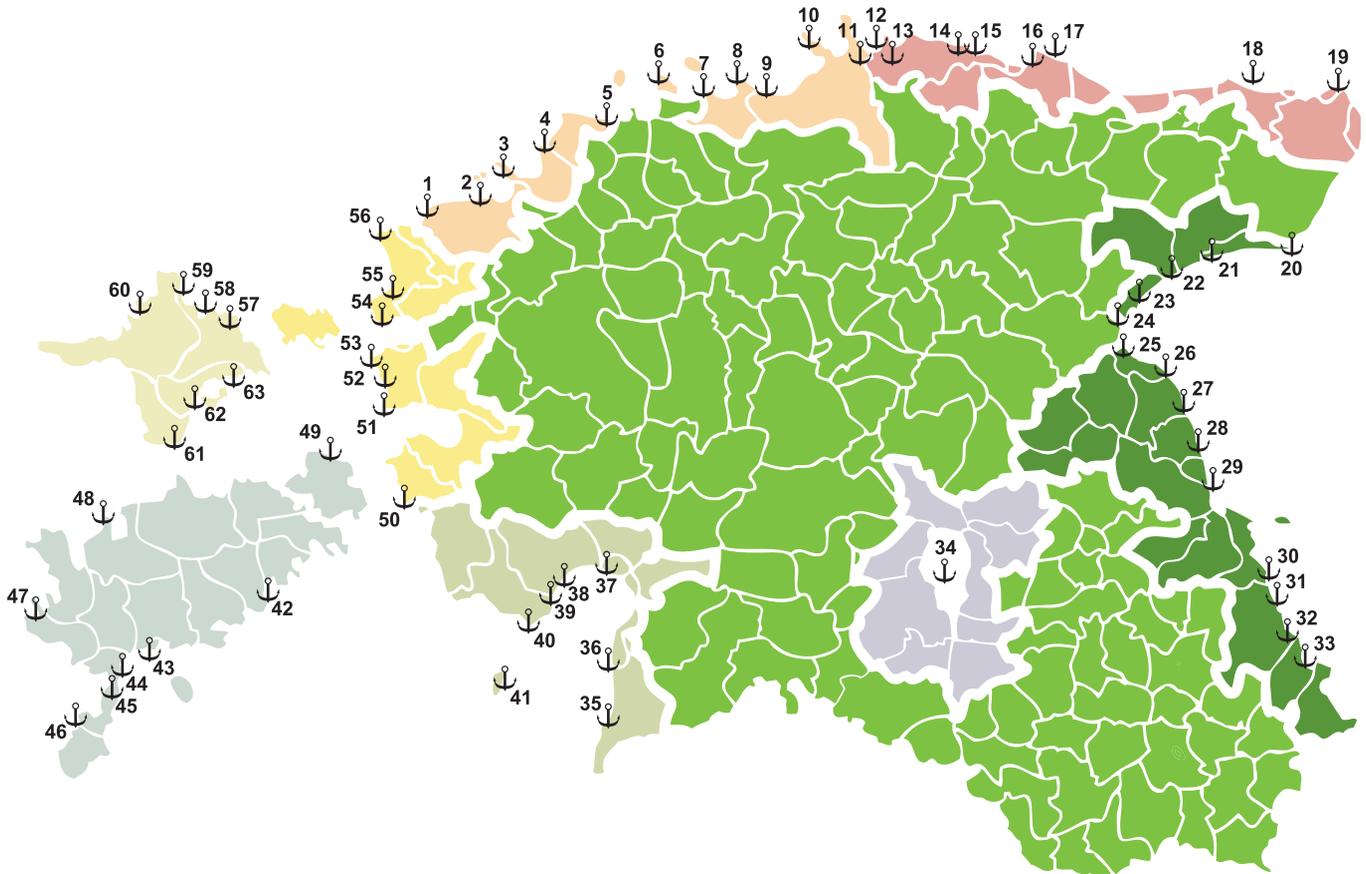
In this action area, the renovation or construction of ports and their infrastructure is supported as the main activity. In the action area, ports and landing sites that meet the requirements in the annexes to the regulation on measure 4.1. Unlike the other fisheries areas, the Lake Võrtsjärv fisheries area is planning no measure 4.1 funds for fishing ports and landing sites. Measure 4.1 funds can be used for high-value investments that presuppose a significant own contribution, but based on the strategy, the fishers and business operators in the area have no interest or means to engage in port development in the area over the coming five years. According to the strategy for Lake Võrtsjärv, it is planned to conduct a survey to identify the need for renewing fishing ports and landing sites and to make the planned investments out of the funds of the action group and out of additional funds. According to the strategies, fisheries areas plan to renew approximately 60 ports and landing sites in all. In terms of individual fisheries areas, the renewal of ports and landing sites during the implementation period of the strategies is planned on the following scale:

- ▶ Harjumaa: 10
- ▶ Hiiumaa: 7
- ▶ Läänemaa: 7
- ▶ Lake Peipsi: 11-14
- ▶ Pärnumaa: 7
- ▶ Saaremaa: at least 6
- ▶ Virumaa: at least 10
- ▶ Lake Võrtsjärv: at least 1



ACTION AREAS AND OBJECTIVES

Figure 2. Map of fishing ports to be developed by fisheries areas



| | | | |
|-----------------|------------------|---------------|-----------------------|
| 1 Ristna * | 17 Mahu | 33 Lüübnitsa | 49 Võrkaia |
| 2 Kurkse * | 18 Toila * | 34 ... ** | 50 Virtsu Vanalinna * |
| 3 Paldiski * | 19 Narva-Jõesuu | 35 Jaagupi * | 51 Puise |
| 4 Lohusalu * | 20 Vasknarva * | 36 Võiste | 52 Topu |
| 5 Tilgu | 21 Alajõe * | 37 Vana-Sauga | 53 Pusku |
| 6 Leppneeme * | 22 Rannapungerja | 38 Lindi * | 54 Österby * |
| 7 Neeme | 23 Lohusuu * | 39 Liu * | 55 Hara * |
| 8 Kaberneeme | 24 Kalmaküla | 40 Lao * | 56 Dirhami * |
| 9 Salmistu * | 25 Raja * | 41 Kihnu * | 57 Suursadama * |
| 10 Tapurla port | 26 Omedu * | 42 Kungla | 58 Hiiesaare * |
| 11 Eru | 27 Kallaste * | 43 Nasva * | 59 Kärdla |
| 12 Käsmu | 28 Kolkja | 44 Salme | 60 Kõrgessaare * |
| 13 Võsu | 29 Varnja * | 45 Läätsa * | 61 Sõru * |
| 14 Eisma | 30 Mehikoorma | 46 Kaunispe * | 62 Orjaku * |
| 15 Karepa | 31 Räpina * | 47 Atla * | 63 Salinõmme |
| 16 Kunda * | 32 Võõpsu * | 48 Vahuranna | |

* entered into Port Register

** name of the new port not cited in the strategy

Saaremaa – it is planned to renew at least 6 ports or Landing sites. The map shows 8 of the strategically more important ports in the estimation of the fisheries area.

Virumaa – the map shows 9 of the ports cited in the strategy. According to the strategy, it is planned to renew at least 10 ports and landing sites.



Processing and direct sales of fisheries products

All of the fisheries areas have considered it necessary to develop the processing and direct sales of fisheries products. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries areas are.

Need for implementing the action area

This action area consists of two components: processing of fishery products in a fisheries area and the sales of fishery products from the producer directly to the consumer or to a retail operator that sells these products directly to the consumer. The main reason for the implementation of this action area is to increase fishers' incomes by adding value to them and through the direct sales of fish.

Fisheries areas indicate in their strategies that fish processing is not widely engaged in throughout the areas, which has brought about a situation where buying-in prices are low, fishers' incomes are low and unstable, and due to the seasonality of fishing, there are periods in a year when fishers have no income. At the same time, fish processing would make it possible to increase the value of local fish, reduce seasonality and thereby increase the incomes of fishers and business operators in the area.

For ensuring better incomes and fairer prices, the other important component is direct sales, whereby the potential impact of fisheries products is minimised. Currently, direct sales occur via personal contacts and bigger quantities of fresh fish are sold directly to first buyers or the fish processing industry, which dictate the price of fish based on supply and demand at any given time. This results from fishers having no facilities for the long-term storage of fresh fish. Consequently, it is necessary to create facilities for processing and selling fish, including the necessary investments in buildings and equipment. Besides the creation of facilities, it is necessary to develop products and introduce new technologies.

Objectives for the action area

In the action area of the processing and direct sales of fish products, the objective of fisheries areas is to increase the number of companies engaged in adding value to fish and to create comprehensive and up-to-date facilities for processing fish and aquaculture products to ensure a higher added value for the products.

An important objective of the action area is to develop direct sales. For instance, the Lake Peipsi fisheries area has the objective of launching an Internet-based sales portal and direct sales outlets. The Pärnumaa fisheries area has the objective of developing a direct sales system consisting of interactive, local sales, and sales via a network. Saaremaa and Harjumaa have set themselves the objective of creating a website and publications to support the sales of fisheries products.

For both processing and sales, fisheries areas consider joint action by fishers important. The objective of the strategy for the Hiiumaa fisheries area is for buying in, storing, processing, and selling fish to occur through the co-operation of the fishers. The objective of the strategy for the Läänemaa fisheries area is for at least 40% of fisheries products to be processed and sold through fishers' commercial associations. The strategy for Virumaa indicates as an objective the establishment of a sales organisation through the co-operation of the fishers.



ACTION AREAS AND OBJECTIVES

Specific objectives and targets of fisheries areas in the action area of processing and selling fish products have been described in the table below.

| AREA | OBJECTIVE | TARGET |
|-------------|--|---|
| Harjumaa | For the processing of fish and/or aquaculture products, product development and sales, up-to-date and environmentally friendly facilities have been set up, ensuring a higher added value for products and the ability to meet changing consumption demands. | <ul style="list-style-type: none"> ▶ Micro-businesses in the area have established or updated facilities for the processing and transport of fish and/or aquaculture products. Structures required for processing have been renewed or constructed. ▶ As a result of product development by micro-businesses, a number of new products have come on the market. ▶ There is a website and documents to support the sales of fisheries products. |
| Hiiumaa | Much of the caught fish is used to make products for own use with high added value and to provide catering for tourists. Buying in, storing, processing, and selling fish occur through co-operation amongst the fishers. On the coastal fishers' initiative, there are various micro-businesses based predominantly on local resources and know-how to distribute products and services in Hiiumaa, Estonia, and the Baltic Sea area. | <ul style="list-style-type: none"> ▶ In Hiiumaa, at least three micro-businesses operate whose main business is the production of fisheries products with high added value based on traditional recipes (by 2015). ▶ Inhabitants and holiday makers in Hiiumaa are able to regularly purchase fish caught in the coastal waters and fisheries products made in Hiiumaa from designated outlets in at least three different locations on the island (by 2015). |
| Läänemaa | Value is added locally to fish caught by the fishers in the Läänemaa fisheries area, and fishers' incomes are not declining. There is a functioning collection and sales system. Fishers in the Läänemaa fisheries area provide the consumer with quality fish products with high added value year-round. | <ul style="list-style-type: none"> ▶ Create the prerequisites in the Läänemaa fisheries area for the initial processing of fish on a more extensive scale than was the case to date. ▶ Organise the collection and processing of fish in the Läänemaa coastal fisheries area, considering the interests of fishers and the demand on the market, by relying on co-operation and joint action. ▶ Caught fish undergo initial processing and chilling as soon as possible. ▶ To sell fish more effectively, direct sales, product development, and fish products are used. ▶ At least 40% of fisheries products are processed and sold through fishers' commercial associations. |
| Lake Peipsi | Increase the number of companies engaged in increasing the value of fish in the Lake Peipsi fisheries area. We will launch PKAK's Internet-based sales portal and direct sales outlets. | <ul style="list-style-type: none"> ▶ By 2013, there are at least 2 new companies engaged in increasing the value of fish in the Lake Peipsi fisheries area. ▶ Launch of an Internet-based sales portal and direct sales outlets. |
| Pärnumaa | Overall and technical improvement of the working environment and improvement of product quality. Requirements include updating a selection of products fit for sales and the development of a brand for the products. The Pärnumaa fisheries area has the objective of developing a direct sales system consisting of interactive, local sales, and sales via a network. | <ul style="list-style-type: none"> ▶ By 2013, in the area of operation of NGO Liivi Lahe Kalanduskogu, there is a functioning and recognised direct sales chain. |



| AREA | OBJECTIVE | TARGET |
|----------------|--|---|
| Saaremaa | For the processing of fish, agar-agar and/or aquaculture products, product development, and sales, up-to-date and environmentally friendly facilities have been set up, ensuring a higher added value for products and the ability to meet changing consumption demands. | <ul style="list-style-type: none"> ▶ By 2013, a total of six micro-businesses in the area have established or updated facilities for the processing and transport of fish, agar-agar and/or aquaculture products. As a result of product development by micro-businesses, at least 10 new products have come on the market. ▶ There is a website and publications (at least 1 publication annually) to support the sales of fisheries products. |
| Virumaa | Diverse facilities are ensured for handling and processing fish in the fisheries area. The price offered to fishers for fish is fair in market economy terms and matches the shared interests of fishers. | <ul style="list-style-type: none"> ▶ A sales organisation based on joint action by fishers has been created (by 2010, there is one company consolidating fishers). ▶ By 2013, at least 5 investment sites related to the initial processing and direct sales of fisheries products have been constructed. ▶ By 2020, at least 4 surveys on the needs for handling and processing fisheries products have been conducted. |
| Lake Võrtsjärv | Processing and direct sales of fisheries products. | <ul style="list-style-type: none"> ▶ In 2013, in the Lake Võrtsjärv fisheries area at least one successful and recognised business operator is engaged in fish processing. ▶ Thanks to the processing and direct sales of fish, fishers' incomes in the area have increased at least 20% by 2013. |

Activities supported

In accordance with their problems and needs, fisheries areas plan to support the following activities in this action area:

- ▶ Renewal and construction of buildings needed for the processing of fish and aquaculture products, together with necessary technical systems and processing equipment, including the equipment that is required for performing quality assurance.
- ▶ Development of fish and aquaculture products and the introduction of new technologies.
- ▶ Development of direct sales channels and solutions, including the construction of the necessary building and the acquisition of equipment. In the Lake Peipsi fisheries area, launching an Internet-based sales portal and direct sales outlets are supported. In the Pärnumaa fisheries area, it is planned to develop a direct sales system consisting of interactive, local sales, and sales via a network. Sales are supported with a website and information materials (Harjumaa and Saaremaa). By way of direct sales solutions, the Läänemaa fisheries area indicates a gutting house, a fish delivery truck, fish auctions, and direct supply to hotels.

The Lake Võrtsjärv, Hiiumaa, Saaremaa and Lake Peipsi fisheries areas have set themselves a quantitative objective for the creation of fisheries-related micro-businesses. In these fisheries areas, a total of 11 micro-business engaged in the processing of fish and aquaculture product should be operating once the strategies have been implemented.



Developing fisheries-related tourism and regenerating and developing coastal villages

All of the fisheries areas plan to engage in developing tourism and in revitalizing coastal villages. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries areas are.

Need for implementing the action area

All of the strategies indicate the strength of a fisheries area in regard to tourism potential, that is, the areas have the prerequisites for developing fisheries and maritime tourism – there are traditional coastal villages with an interesting history and cultural heritage, and facilities for both enjoying nature and active recreation, etc. At the same time, the areas estimate that they have not fully exploited their tourism potential. The implementation of activities in this action area would allow the areas to exploit their potential more effectively. Developing fisheries-related tourism products would make possible alternative operating opportunities for fishers, tourism operators, and other local residents, increasing incomes in the area.

Secondly, implementation of the action area will have a positive effect on the preservation of the traditional lifestyle of coastal villages. Developing tourism is closely related to the preservation and regeneration and development of the living environments in coastal villages, which is important for both local residents and tourism. Consequently, activities in this action area are important in terms of ensuring the sustainability of coastal fisheries.



Objectives for the action area

The objective of the action area is, on the one hand, to ensure the preservation of the physical and social environments of cultural and environmental value and, while the other hand, to increase the attractiveness of the areas as tourist sites. In brief, the similar objectives of fisheries areas in this action area are as follows:

- ▶ Creation and/or development of infrastructure and services promoting fisheries-related tourism
- ▶ Preservation and protection of traditional coastal villages, cultural heritage, nature, and cultural and environmental values
- ▶ Organising events to provide information about fishers' traditions, coastal villages, and the fisheries area

Aside from this, the fisheries strategy for Läänemaa separately indicates that tourism development must keep in mind the sustainable use of cultural heritage and nature. The fisheries strategy for Hiiumaa separately indicates the need to reduce the seasonality of services. The fisheries strategy for Pärnumaa provides for co-operation between various institutions in the third sector (including the LEADER action group) as an objective in this action area. Specific objectives and targets of fisheries areas in the action area of developing tourism and revitalizing coastal villages have been described in the table below.

| AREA | OBJECTIVE | TARGET |
|----------|--|---|
| Harjumaa | Coastal villages are valuable living environments and attractive tourist sites. | <ul style="list-style-type: none"> ▶ Fisheries-related tourism products are attractive and mainly used by inhabitants in the capital. ▶ In the rural municipality of each area in a county, there a nice coastal village has been developed, which is both a living environment of social and environmental value and an attractive tourist site. ▶ Facilities have been created for the preservation and showcasing of maritime and fisheries cultural heritage. ▶ Events that provide information on or relate to the regeneration and development of fisheries and coastal village traditions are held periodically. |
| Hiiumaa | The coastal waters and small islands of Hiiumaa have become a well-known summer destination for those engaged in maritime and fisheries-related tourism, offering recreation for kayak and canoe tourists, yachtsmen, recreational fishers, and bird watchers. | <ul style="list-style-type: none"> ▶ In co-operation between fisheries and tourism operators in Hiiumaa, the infrastructure needed to provide services is rolled out, and the fisheries sector provides fisheries and maritime tourism services, besides its main business, that are well-known in both Estonia and the Nordic countries (by 2015). ▶ In co-operation with fisheries operators, tourism operators in Hiiumaa have expanded the provision of services related to fisheries-related tourism, and the seasonality of services has decreased (by 2015). ▶ Regular events providing information about coastal villages and fisheries traditions are held in Hiiumaa. Historical structures in ports or on the shore that are characteristic of coastal fisheries are restored or renovated, and exhibitions that provide information on coastal fisheries traditions are developed (by 2015). |



ACTION AREAS AND OBJECTIVES

| AREA | OBJECTIVE | TARGET |
|-------------|---|---|
| Läänemaa | In the Läänemaa fisheries area, the traditional activities of coastal villages and maritime tourism are developing and supporting each other. Coastal fishers, business operators, village communities, and local governments co-operate comprehensively to use the opportunities in the Läänemaa fisheries area more effectively and to preserve its assets. | <ul style="list-style-type: none"> ▶ The creation and development of infrastructure and services that promote fisheries-related tourism. ▶ Create the prerequisites by preserving and protecting traditional coastal villages, cultural heritage, nature, and cultural and environmental values. ▶ Develop the tourism industry based on the cultural heritage of coastal villages and the particular features of local nature, while using cultural heritage and nature sustainably. ▶ In co-operation between tourism operators and fishers, develop tourism products that provide memorable experiences for the tourist, attract sustainable numbers of tourists to the area, and provide local operators with a sufficient income. ▶ Coastal fishers, local governments, and village communities cooperate in diverse ways to exploit the assets and opportunities in the area more effectively. |
| Lake Peipsi | Increase the number of providers of a quality fisheries-related tourism service in the Lake Peipsi fisheries area and develop fisheries-related tourism packages aimed at target groups. | <ul style="list-style-type: none"> ▶ Increase the number of providers of a quality fisheries-related tourism service by a third. ▶ Develop fisheries-related tourism packages aimed at target groups. ▶ A fisheries museum has to be established in the area. |
| Pärnumaa | <p>Develop co-operation with various institutions, such as NGO Pärnu Lahe Partnerluskogu, NGO Eesti Maaturism, SA Pärnumaa Turism, etc.</p> <p>Create various tourism products, with a particular emphasis on developing participant tourism in coastal fisheries to demonstrate traditional fishing methods.</p> | <ul style="list-style-type: none"> ▶ By 2013, coastal life in Pärnumaa has been made attractive and sustainable, providing various services to both local residents and tourists on both land and at sea. |
| Saaremaa | Coastal villages are living environments of a social and environmental value and an attractive tourist site. | <ul style="list-style-type: none"> ▶ Fisheries-related tourism products are attractive and used by at least 5,000 visitors annually. ▶ In the county, at least 7 coastal villages which are both living environments of a social and environmental value and attractive tourist sites have been developed. ▶ Facilities have been created in at least 6 locations for the preservation and showcasing of maritime cultural heritage. ▶ In coastal villages, at least 3 events that provide information about fisheries traditions and are related to the regeneration and development of the coastal village are held annually. |



| AREA | OBJECTIVE | TARGET |
|----------------|--|--|
| Virumaa | The fisheries area has a well-developed, diverse, and sustainability-compatible tourism industry. The area has a well-maintained infrastructure and a good availability of the services required for everyday life. The living environment in the coastal village is safe and clean. | <ul style="list-style-type: none"> ▶ By 2013, at least 10 new services related to the specifics of fisheries and the coastal village have been launched. ▶ By 2015, at least 5 new tourism companies geared towards tourists interested in history, nature, and culture have been created. ▶ By 2020, at least 4 surveys in the tourism sector have been conducted. ▶ By 2013, at least 4 sites improving the living environment in the coastal village have been constructed. ▶ By 2020, at least 4 satisfaction surveys of the local population have been conducted to prevent and solve problems. |
| Lake Võrtsjärv | Regenerating and developing fisheries-related tourism and coastal villages. | <ul style="list-style-type: none"> ▶ In 2013, tourism companies in the Lake Võrtsjärv area provide at least ten products/services related to the Lake Võrtsjärv fisheries. ▶ At least one event of Estonia-wide importance that provides information about Lake Võrtsjärv's fishers' traditions, coastal villages, and the Lake Võrtsjärv fisheries area is held annually (by 2013). ▶ The number of visitors to the area has increased by at least 20%, with the duration of stay in the area having also increased (by 2013). ▶ When new buildings are constructed in coastal villages, old construction methods and materials (clay, reed) are used. Training events and workshops are held regularly to keep alive the traditions of coastal villages and fishers (by 2013). |

Activities supported

The major activities planned in the action area are as follows:

- ▶ The development of fisheries-related tourism products (in co-operation with other tourism operators and service providers)
- ▶ Investments related to serving tourists (equipment needed for catering, fishing jetties, holiday cottages, picnic grounds, etc.)
- ▶ Creation of a well-maintained environment for the provision of a quality tourism service (including the renovation of fisheries-related architectural heritage, landscaping the environs; cleaning up bodies of water and shore areas)
- ▶ Projects related to regenerating and developing the coastal village and providing information about fishers' traditions (such as showcasing the maritime cultural heritage, events that highlight the coastal village, for instance, the establishment of a fisheries museum is planned in the Lake Peipsi area, etc.)



ACTION AREAS AND OBJECTIVES

- ▶ Promoting marketing projects (including joint marketing projects by fisheries-related tourism operators)

In their strategies, the Vörtsjärv and Virumaa fisheries areas provide for a quantitative objective for the creation of fisheries-related tourism products and services. The fisheries area has set itself the objective of providing at least ten new such services and/or products by the end of the implementation of the strategy.





Diversification of activities

The diversification of activities is considered important by all of the fisheries areas. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries areas are.

Need for implementing the action area

Implementation of this action area makes it possible to diversify the economic structure in the areas, reducing the risks that result from the seasonality of fishing and generating additional revenue for the areas. The diversification of activities is important, since according to the strategies for the fisheries areas, the number of fishers that make a living out of fishing is small, and there is a need for supplementary activities to ensure incomes. In connection to this, it is also necessary to pay attention to the other industries.

In the strategies for the fisheries areas, potential additional activities outside of the fisheries sector are envisaged especially in holiday industry, catering, services provision, and crafts. In addition, the Hiiumaa fisheries area has indicated promising activities in the construction of wood and plastic panels, manufacturing of traps and nets, and metal working. The implementation of these activities would diversify the fishers' activities and provide their family members with employment and regular income.

Objectives for the action area

All of the fisheries areas have set themselves the objective of diversifying the activities of fisheries companies and fishers, i.e. activity in alternative areas of operation besides the main business. Mainly, accommodation, catering, and crafts are seen as supplementary areas of operation.

The purpose of the diversification of activities is to enable alternative activities to create further employment opportunities in the fisheries area. Thereby, a contribution is made to ensuring the sustainability of the community by preserving or increasing the population. Specific objectives and targets of fisheries areas in the action area of diversifying activities have been described in the table below.



ACTION AREAS AND OBJECTIVES

| AREA | OBJECTIVE | TARGET |
|----------------|--|--|
| Harjumaa | Entrepreneurship in coastal villages is diverse and supports the sustainable and balanced development of the local community, ensuring the preservation or increase of the population. | <ul style="list-style-type: none"> ▶ Micro-businesses in the fisheries sector in the fisheries area have created additional jobs in the area. ▶ Accommodation establishments and catering companies have the necessary equipment, including IT equipment, to meet the set requirements. ▶ Buildings required for crafts and manufacturing have been renewed and fitted out with the necessary equipment. ▶ The premises of service companies are well-maintained and fitted out with the equipment they require for their service. |
| Hiiumaa | By 2013, Hiiumaa is [...] an island with entrepreneurship that provides supplementary employment opportunities for coastal fishers. | <ul style="list-style-type: none"> ▶ Fishers in Hiiumaa provide, aside from their main business, services to holiday makers and local residents, and they produce small batches of various pre-fabricated products or ready products (by 2015). ▶ Fisheries operators in Hiiumaa develop small-scale production in sectors that value natural resources characteristic of Hiiumaa and are guided by traditional areas of operation (by 2015). |
| Läänemaa | The diversification of activities creates opportunities for receiving supplementary income in the fisheries area, and it helps business operators in the fisheries sector or their families to find work and additional employment near their homes. Activities to be developed are aimed at the needs of both local residents and tourists. New activities use resources in the area sustainably. | <ul style="list-style-type: none"> ▶ Develop activities based on local resources and cooperation with business operators in the area. ▶ Develop new activities, production and services that consider the needs of local residents and tourists. |
| Lake Peipsi | Expand the operation of fisheries micro-businesses through accommodation, catering, and/or crafts. | <ul style="list-style-type: none"> ▶ Expansion of the activities of at least two fisheries-related micro-businesses through accommodation, catering, and/or crafts. ▶ Groups of mementos characteristic of the area are developed. |
| Pärnumaa | Establishment of a themed fish restaurant where seminars, marketing events and smaller conferences may also be held. Create an opportunity for alternative activities outside of the sector. | <ul style="list-style-type: none"> ▶ By 2013, a year-round functional system has been created to provide various fisheries-related tourism products; a fish restaurant is up-and-running. |
| Saaremaa | Entrepreneurship in coastal villages is diverse and supports the sustainable and balanced development of the local community, therefore ensuring the preservation or increase of the population. | <ul style="list-style-type: none"> ▶ At least 10 micro-businesses in the fisheries sector have found supplementary employment opportunities in the services or crafts sectors. |
| Virumaa | There is diverse economic activity in the fisheries area. | <ul style="list-style-type: none"> ▶ By 2013, at least 4 new companies engaged in activities outside fisheries have been established. |
| Lake Võrtsjärv | Diversification of activities. | <ul style="list-style-type: none"> ▶ By 2013, employment in the area will increase 10%. ▶ Of the people employed in the fisheries sector to date, 10% have found employment in alternative areas of operation (accommodation establishments, catering and services companies, crafts, manufacturing, etc.) in the Lake Võrtsjärv area by 2013. |



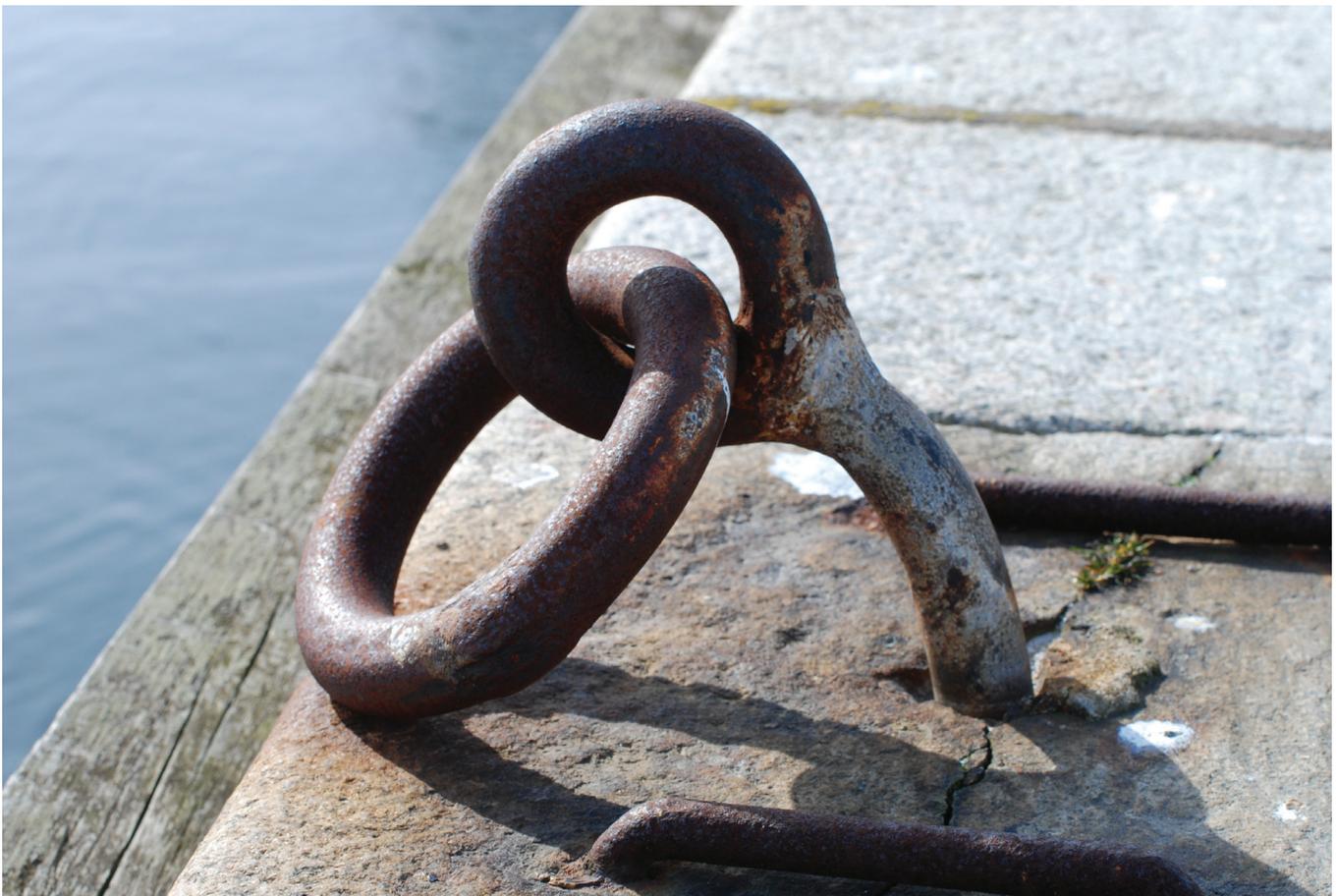
Activities supported

To diversify activities, the fisheries areas plan to support the following activities:

- ▶ Acquisition of the equipment needed to meet the requirements for accommodation establishments and catering companies
- ▶ Renewal of buildings and the acquisition of the equipment required for crafts and manufacturing
- ▶ Renewal of buildings and acquisition of equipment for services companies

In this action area, the production of mementos to provide information about the fisheries areas are envisaged (Lake Peipsi and Pärnumaa fisheries areas). The Läänemaa fisheries area indicates that it is important to link production, product development, services development, sales and the development of co-operation to training activities. The Pärnumaa fisheries area plans to establish a themed fish restaurant in this action area.

The Lake Peipsi, Saaremaa, and Virumaa fisheries areas have set themselves the quantitative objective of the number of fisheries companies that have expanded into other areas of operation (accommodation, catering, crafts, etc.). Overall, it is planned in these fisheries areas to arrive to the conclusion of the strategy period at which point at least 16 fisheries companies have expanded into other areas of operation.





Training activities

All of the fisheries areas plan to engage in training. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries areas are.

Need for implementing the action area

Training activities are important for the implementation of the action areas, i.e. they support all of the strategic action areas and are a component that boost them significantly. It is evident from the strategies that fishers and fisheries-related business operators in a area need more training events on project set-up and drafting as well as advice on the diversification of activities. Fishers lack the skills to develop new products and services; there is also a lack of knowledge of small-scale fish processing and the provision of tourism services. The Saaremaa fisheries area indicates amongst other things fishers' limited foreign language skills, which is a weakness in regard to their involvement in fisheries-related tourism. The action area is needed to share up-to-date and novel knowledge with coastal fishers, and to expand the horizons of the members of that group. Implementation of this action area would contribute to the creation of innovative solutions for fishing, processing, sales, and fisheries-related tourism. It is necessary to organise training events and information days as well as to draw up study materials on the said areas. The action area aims to achieve the adequacy of human resources for the objectives set. The fisheries strategy for Virumaa indicates that quality training events have not been accessible due to their high cost. It is also believed that the implementation of this action area will encourage entrepreneurship as well as private and citizenship initiative in the fisheries areas.

Objectives for the action area

The objective is for commercial fishers, fisheries sector employees, and tourism operators operating in a fisheries area to participate in training programmes related to promoting professional skills and other topics pertaining to the implementation of the strategy (including training events on sustainable fisheries and new opportunities for the innovative development and sales of products). Unlike the other areas, the fisheries strategy for Läänemaa envisages explaining to those active in the fisheries sector the need for training and providing information to them about training options, in addition to their attendance at training events. The fisheries strategy for Virumaa also cites the existence of a active society and social life as an objective for this action area.

ACTION AREAS AND OBJECTIVES



| AREA | OBJECTIVE | TARGET |
|--------------|--|--|
| Harjumaa | People operating in the fisheries area are trained and active. | <ul style="list-style-type: none"> ▶ Most of the fisheries operators in the area have attended training events, which have advanced their professional skills and overall adaptability as well as improved their work skills. |
| Hiiumaa | Training activities. | <ul style="list-style-type: none"> ▶ Fisheries operators in Hiiumaa regularly attend training events related to the promotion of professional skills and the implementation of other action areas of the strategy (by 2015). |
| Läänemaa | Training activities support the implementation of the action areas of the strategy. Training activities support the preservation of the traditional activities, lifestyles, and cultures of coastal villages as well as ensuring their continuity. Training activities support the development of new activities, tourism, and entrepreneurship in coastal villages. Training activities help fishers and inhabitants in coastal villages to adapt to and cope with changes. | <ul style="list-style-type: none"> ▶ Identifying and justifying the training need of those active in the fisheries sector. ▶ Identifying opportunities on the training market based on the action areas of the strategy and training needs. ▶ Planning joint training events in areas that help to increase the capability and competitiveness of those active in the fisheries sector. ▶ Providing information about various training options to those active in the fisheries sector. |
| Peipsi järve | Provide training events at a good level in the Lake Peipsi fisheries area on sustainable fisheries and new opportunities for the innovative development and sales of products. | <ul style="list-style-type: none"> ▶ Training events on project drafting and execution. ▶ National and international study trips to various fisheries areas are organized to gain experience and ideas. ▶ By 2013, NGO Peipsi Kalanduspiirkonna Arendajate Kogu needs to be a sufficiently strong organisation to be able to continue the joint work initiated and the development of the entire area once the funding of the EFF measure ends. ▶ A development plan for the organisation is drafted. ▶ The provision of reliable and professional information using an independent information channel. ▶ Co-operation with all of Estonia's 8 fisheries areas. |
| Pärnumaa | Stay up to date on the developments in the fisheries sector elsewhere in the world. Organise at least 2 study trips annually for members in the group to gain experience. | <ul style="list-style-type: none"> ▶ In the area of operation of NGO Liivi Lahe Kalanduskogu, continuous training activities are ensured both for our team and for our partners and network. |
| Saaremaa | People operating in the fisheries area are competent and active. | <ul style="list-style-type: none"> ▶ At least 100 people have attended training events, which have supported their professional skills, adaptability, employability, or coping in life in some other way. |
| Virumaa | Inhabitants in the fisheries area learn and are enterprising. There is an active society and social life in the area. | <ul style="list-style-type: none"> ▶ By 2013, training events aimed at the population and fishers (at least 10 of both short and long-term training events and at least 150 trainees) have been conducted. ▶ By 2013, joint training events have been conducted with partner organisations within the area (at least 10 of both short and long-term training events and at least 100 trainees). |



ACTION AREAS AND OBJECTIVES

| AREA | OBJECTIVE | TARGET |
|----------------|----------------------|--|
| Lake Võrtsjärv | Training activities. | <ul style="list-style-type: none"> ▶ Annually, at least 25% of commercial fishers, fisheries sector employees and tourism operators active in the fisheries area participate in training programmes (by 2013). ▶ The participation in training programmes has raised the quality of (tourism) services offered in the area and directly increased the number of services and packages related to fisheries in Lake Võrtsjärv (by 2013). ▶ At least 30% of the courses and training events offered are related to developing and providing information about the Lake Võrtsjärv fisheries area (e.g., fisheries-related workshops, study camps, etc.) (by 2013). |

Activities supported

The fisheries areas are planning the following activities by way of training activities:

- ▶ Training events and study and information days to develop professional skills, adaptability, and competitiveness.
- ▶ Training events and study trips to support the development of joint work and co-operation.
- ▶ Finding out more about national and international experience.

The Saaremaa fisheries area also indicates the provision of basic language instruction, as this is an important skill for involvement in fisheries-related tourism. This action area also includes identifying training needs and/or conducting surveys (Läänemaa, Saaremaa, Pärnumaa).

The Saaremaa and Virumaa fisheries areas also indicate a specific objective in terms of the number of trainees. It is intended that training events be organised for about 350 trainees by the end of the strategy period.





Eel fishing industry Lake Vörtsjärv fisheries area

The eel fishing industry is designated as an action area in the Lake Vörtsjärv fisheries area. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries area are.

Need for implementing the action area

The importance of eel fishing industry in the Lake Vörtsjärv fisheries area is considered significant, and the most important issue that needs to be resolved in this action area is how to achieve stability in terms of restocked eel volumes. The wish of fishers and business operators is for the volume of restocked eel to increase. There is a desire to find funding options for this. Measure 4.1 criteria do not make it possible to apply for funds to purchase eel fry under this measure.

Objectives for the action area

The objective of the Lake Vörtsjärv fisheries area in this action area for the quantity of restocked eel fry to have remained stable or increased by 2013 (pre-farmed eel restocked at a volume of at least 350,000).

Activities

There is a desire to find additional options for purchasing eel fry. The objective is to keep the numbers and catches of eel and also other fish species stable or to try to increase them by finding additional funding options, advising fishers and fisheries operators, and negotiating with the state agencies in charge.



Dredging landing places Lake Võrtsjärv fisheries area

Dredging landing places is designated as an action area in the Lake Võrtsjärv fisheries area. Below, a description is provided of what prompted the need for the implementation of this action area, and what the objectives and planned activities of the fisheries area are.

Need for implementing the action area

The Lake Võrtsjärv area has set out this action area as stand-alone, since as a result of regular fluctuations in the water levels in Lake Võrtsjärv there is a need for regularly dredging landing places. As part of measure 4.1, it is possible to fund dredging works related to bringing ports and landing sites into conformity with the requirements. The fisheries area plans no expenditure of funds under the measure on this activity, as there are no ports or landing sites that meet the requirements, and as at present fishers and business operators in the area also have no interest or means to engage in port development in the next five years. Consequently, other funding avenues have to be found to dredge landing places and to try to reach agreements with the Ministries of the Environment and Agriculture concerning an agreement for the funding of long-term works.

Objectives for the action area

Objectives for the action area by 2013 are as follows:

- ▶ A functioning solution has been found for how to fund the clearing of landing places of sediments, in view of Lake Võrtsjärv as a whole.
- ▶ 1. The necessary equipment to dredge landing places has been acquired for the Lake Võrtsjärv fisheries area.

Activities

Funding avenues are sought for dredging landing places. The role of NGO Võrtsjärv Kalanduspiirkond on this issue is seen as taking initiative as one representative of fishers and of fisheries operators.



Summary

All of the fisheries areas act in five action areas

- ▶ Renewal of fishing ports and landing sites
- ▶ Processing and direct sales of fisheries products
- ▶ Regenerating and developing fisheries-related tourism and coastal villages
- ▶ Diversification of activities
- ▶ Training activities

In addition to the said action areas, the Lake Vörtsjärv fisheries area has additionally defined two action areas: the eel fishing industry and the dredging of landing places.

Renewal of fishing ports and landing sites

The need for the renewal of fishing ports and landing sites results from their poor technical condition. Therefore, the objective of this action area is to ensure the availability of ports and landing sites that meet the requirements and the needs of an area. In this action area, the renovation or construction of ports and their infrastructure is supported as the main activity.

Processing and direct sales of fisheries products

The action area is implemented out of the need to increase fishers' incomes by means of adding value to fish and its direct sales. In the action area of the processing and direct sales of fish products, the objective of fisheries areas is to increase the number of companies engaged in adding value to fish, create comprehensive and up-to-date facilities for processing fish and aquaculture products to ensure a higher added value for the products. Support is provided for investments in the buildings required for processing fish and aquaculture products, product development and the introduction of new technologies, and the development of direct sales channels and solutions.

Regenerating and developing fisheries-related tourism and coastal villages

The fisheries areas have a tourism potential that, so far, has not been tapped into. The objective of the action area is, on the one hand, to ensure the preservation of the physical and social environments of cultural and environmental value and, while the other hand, to increase the attractiveness of the areas as tourist sites. Support is provided for the development of fisheries-related tourism products, investments related to serving tourists (including maintaining the environment), regenerating and developing the coastal village, and projects related to providing information about fisheries traditions and marketing projects.

Diversification of activities

The number of fishers who make a living out of fishing is small, and there is a need for supplementary occupation to ensure incomes. The purpose of the diversification of activities is to enable alternative activities to create further employment opportunities in the fisheries area. Thereby, a contribution is made to ensuring the sustainability of the community by preserving or increasing the population. To diversify activities, support is provided for the renewal of buildings and/or acquisition of the equipment needed for services companies, accommodation establishments and catering companies, and crafts and manufacturing.



Summary

Training activities

Implementing the action areas of a strategy presupposes the availability of human resources who have the knowledge and know-how needed for this, the objective of the action area being to contribute to this. Within the training action area, support is provided for training events, study and information days, study trips, etc.





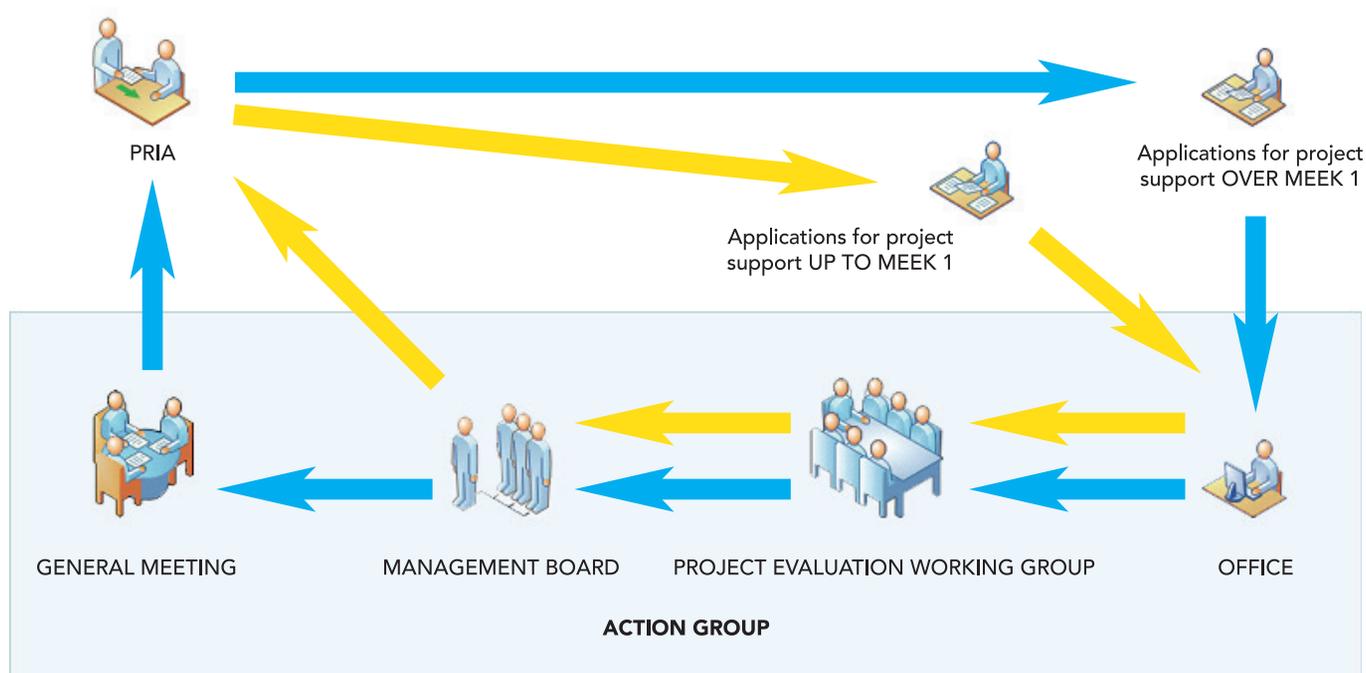
SELECTION OF PROJECTS

The action areas of a strategy are implemented by means of calls for proposals. This section describes the process for the selection of projects, including how project applications are processed in the fisheries areas and what criteria are used to evaluate them.

Processing of project applications

In accordance with the fisheries areas guidance document published by the Ministry of Agriculture ¹¹, the parties involved in organising calls for proposals and the information flows between them may be illustrated in the figure below.

Figure 3. Parties to calls for proposals



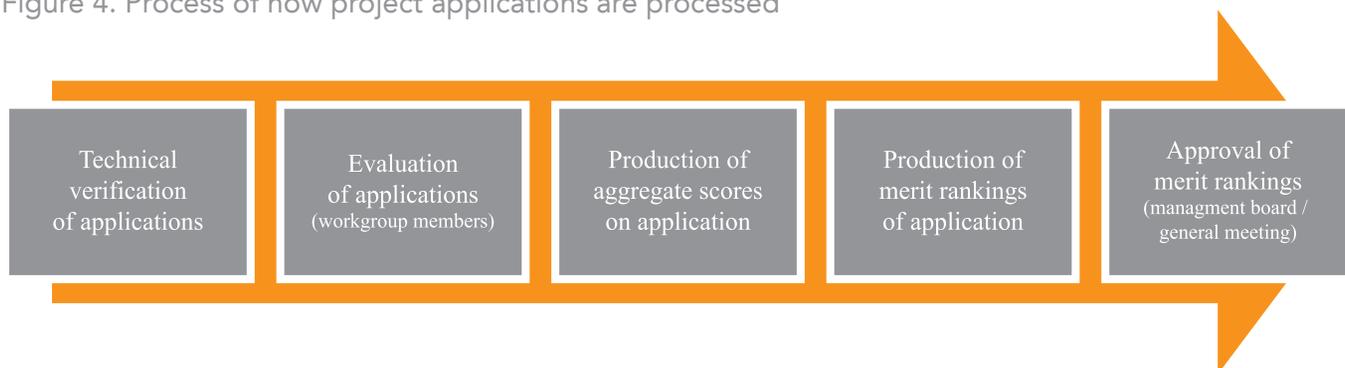
Source: Ministry of Agriculture

¹¹ Ministry of Agriculture (2008). Sustainable development of fisheries areas. A manual for fisheries action groups. Available at: http://www.agri.ee/public/kalanduspiirkondade_kasiraamat.pdf. Viewed last 20 May 2010.



Processing of project applications, including merit ranking of project supports, in the fisheries areas largely follows common principles. There are minor differences with respect to selecting between applications awarded an equal number of points, exclusion from merit ranking, method for awarding points on projects, etc. A general description of the process on how project applications are processed in the fisheries areas is provided in the figure below.

Figure 4. Process of how project applications are processed



Source: [Strategies of fisheries areas](#)

In accordance with the figure presented, in all of the fisheries areas, applications undergo initial technical checks upon receipt, in the course of which the conformity of application documents is verified with the requirements of “the criteria and procedure for awarding and using supports” established by Regulation No 38 of the Ministry of Agriculture of 24th April 2008 under measure 4.1, sustainable development of fisheries areas, in the Operational Programme of the European Fisheries Fund 2007–2013 and other requirements flowing from strategies, laws, etc. If required, an applicant is asked additional questions or is asked to address any deficiencies in the application.

In all of the fisheries areas, projects are evaluated by evaluation working groups. The said working groups include 7-9 main members who include both members of the management boards of action groups and external experts. If required, the assistance of additional experts or specialists is used. Unlike the other areas, in the Harjumaa fisheries area there is a separate evaluation working group for each action area. In the Lake Peipsi fisheries area, a working group for evaluating projects encompassing the entire area and working groups for evaluating county projects are distinguished.

In all of the areas, the method of evaluation is a meeting of an evaluation working group, prior to which applications are examined by evaluators. Unlike the other areas, members in the evaluation working group in the Läänemaa fisheries area visit sites and project areas prior to the substantive evaluation of major investment sites and investments funded in stages.

Each working group member evaluates projects in accordance with evaluation criteria. Based on evaluation sheets, a cumulative score is produced, based on which a proposal is made as to the merit ranking of projects. For evaluation, the most common approach is to complete evaluation sheets and to compute the cumulative score as an average of the (weighted) scores of evaluators (e.g., in the Harjumaa, Hiiumaa, Saaremaa, and Lake Võrtsjärv fisheries areas). In the Pärnumaa fisheries area, by contrast, the completion of evaluation sheets is followed by discussion, after which members may alter their initial preferences and the points they awarded. In the Lake Peipsi fisheries area, points awarded following a joint decision are added to the average total of points awarded by working group members. In the Läänemaa fisheries area, an evaluator has to provide grounds for his/her



Merit ranking is produced based on a ranking starting from the highest number of points. All of the fisheries areas have defined criteria for projects qualifying in merit ranking. For instance, in the Saaremaa, Hiiumaa, Lake Võrtsjärv, and Harjumaa fisheries areas, this is a defined minimum total of points. In the Pärnumaa fisheries area, an application does not qualify if it has been awarded 0 score points by at least three members in an evaluation working group. In the Virumaa, Läänemaa and Lake Peipsi fisheries areas, qualification in merit ranking applies a solution that combines a minimum cumulative score and the disqualification of applications with very low scores.

In the event of equal point totals, areas use different approaches. For instance, in the Saaremaa fisheries area, preference is given to joint action and co-operative projects of several organisations. In the Harjumaa, Hiiumaa, and Lake Võrtsjärv areas, a second evaluation is conducted on applications with equal point totals. In the Virumaa fisheries area, in the event of equal point totals preference is given to applications received earlier. In the Läänemaa area, scores are compared on the criterion of the "consistency of the project with the objectives for the coastal fisheries strategy for Läänemaa". In the Pärnumaa area, a proposal is made to proportionately reduce the amounts sought in the event that there are projects with equivalent numbers of points. In the Lake Peipsi area, preference is based on how long a company has been operating, joint action, sustainability and the creation of new jobs.

Most of the fisheries areas are guided by the principle that when a general merit ranking of projects is produced, projects in all the action areas of a strategy should have equal chances (e.g., Saaremaa, Hiiumaa, Lake Võrtsjärv, Harjumaa, Läänemaa, Virumaa) For this, the same maximum points totals are provided in action areas. In the Pärnumaa fisheries area, the maximum point total in the training action area is lower than in the other action areas, as a result of which this action area is not equal in a general merit ranking. In the Lake Peipsi fisheries area, unlike the other areas, the amount of project supports is divided between counties in accordance with factors approved by a meeting of the management board. The objective of this is to avoid a multitude of supports in one county.

Summary

- ▶ Components in the general process of how project applications are processed include technical checks on applications, evaluation of projects, producing cumulative scores on applications, producing a merit ranking of applications, and approval.
- ▶ Working groups have been formed for the evaluation of projects. In all of the areas, the working method for evaluating is a meeting of a working group.
- ▶ To evaluate project applications, the fisheries areas have developed an evaluation system and evaluation criteria that vary by area.



FINANCIAL PLAN

Under measure 4.1, the sustainable development of fisheries areas, in the Operational Programme of the European Fisheries Fund 2007–2013, supports are provided for the implementation of the following activities¹²:

- ▶ Renewal of fishing ports and landing sites
- ▶ Processing of fishery products in a fisheries area and the sales of fishery products from the producer directly to the consumer or to a retail operator that sells these products directly to the consumer
- ▶ Regenerating and developing fisheries-related tourism and coastal villages
- ▶ Diversification of activities
- ▶ Training activities

The figure below provides the aggregate support amounts of the fisheries areas for various action areas in 2007–2013. It is evident that the highest support amounts are envisaged for the action area of the renewal of ports and landing sites (53% of the total support amount). Support for the action

¹² Criteria and procedure for awarding and using supports under measure 4.1, the sustainable development of fisheries areas, in the Operational Programme of the European Fisheries Fund 2007–2013. Available at: <https://www.riigiteataja.ee/ert/act.jsp?id=12956779>, last viewed 20 May 2010.



area of developing tourism and regenerating and developing the coastal village is 19% and support for the action area of direct sales is 14% of the aggregate support. Support is least for the action area of training activities (5%). For the diversification of activities in the fisheries areas, 10% of the support amount is envisaged.

Figure 5. Support amount distribution by action area (aggregate support for the fisheries areas)



Source: Rural Economy Research Centre 2010

The table below provides an overview of the distribution of the budgets of various fisheries areas across action areas supported under measure 4.1 of the Fisheries Fund, 2007–2013.

Table 2. Distribution of funds across the action areas of a strategy

| No | Action area | Harju | Hiiu | Lääne | Peipsi | Pärnu | Saare | Viru | |
|----|--|--------|------|-------|--------|--------|-------|------|-----|
| 1 | Renewal of fishing ports and landing sites | 58-59% | 51% | 50% | 60% | 70-75% | 40% | 50% | 0* |
| 2 | Processing and direct sales of fisheries products | 15-16% | 16% | 20% | 7% | 1-2% | 17% | 25% | 40% |
| 3 | Regenerating and developing fisheries tourism and coastal villages | 9-10% | 15% | 15% | 25% | 15-20% | 20% | 15% | 25% |
| 4 | Diversification of activities | 8-9% | 15% | 12% | 4% | 2-4% | 20% | 5% | 25% |
| 5 | Training activities | 7-9% | 3% | 3% | 4% | 2-5% | 3% | 5% | 10% |

* According to the strategy, it is planned to conduct a survey to identify the need for renewing fishing ports and landing sites and to make the planned investments out of the funds of the action group and out of additional funds.

Summary

- ▶ In 2009 – 2013, activities in the fisheries areas are supported under the measure for the sustainable development of the fisheries areas (measure 4.1) to a total of 360 million EEK.
- ▶ The fisheries areas plan to use over a half of the supports (53%) for the renewal of fishing ports and landing sites. A fifth (19%) is planned for developing tourism and regenerating and developing coastal villages. Other action areas are supported on a smaller scale.
- ▶ Across the fisheries areas, support amounts vary most in the action area of the processing and direct sales of fisheries products (support for the action area varies from 1-2% to 40% of the support amount in a fisheries area).



SUMMARY

In Estonia, there are eight fisheries areas, and local fisheries action groups have been formed in all of them. These action groups are non-profit associations comprising various participants involved in the fisheries sector (commercial fishers, fishers' associations, fisheries industry, local governments, organisations in the non-profit sector, etc.). In 2008–2009, under the leadership of fisheries action groups, strategies for the fisheries areas were developed to support the sustainable development of the areas.

This document is based on strategies developed by the fisheries areas. Commissioned by the Rural Economy Research Centre, it has been prepared by Ernst & Young in 2010. In the course of the development of the document, the opportunity was also afforded to action groups in the fisheries areas to submit comments and proposals.

The first section of this document contains an overview of the process of the development of strategies and of the current situation in the fisheries areas, including an indication of the main problems and needs of the fisheries areas and a description of their strengths, weaknesses, opportunities, and threats. The second section of the document focuses on the visions, objectives, and chosen action areas of the fisheries areas. In this section, the visions of the fisheries areas as well as the similarities and differences between their objectives are compared. On the choice of action areas, an overview is provided of what activities are planned for implementation in order to accomplish the agreed visions and objectives. The third section of the document focuses on more technical aspects, describing and comparing the process of the selection of projects to be supported and providing an overview of the distribution of funds across various action areas.



Below, a summary is provided of the major topics contained in this document

- ▶ The development of strategies – based on analysis of the current situation, partly from which the visions and objectives of the areas were ascertained and action groups were chosen for their accomplishment. The development of strategies was based on numerous studies and analyses involving close discussions – via working groups and other consultations – with local residents, companies, local governments, and other sectoral specialists.
- ▶ Analysis of the current situation – according to the strategies, the biggest problems of the fisheries areas relate to the low profitability and poor condition of infrastructure in the sector. A business model based on the operation of independent fishers and a lack of unified action dominate. This has left fishers in a weak position to sell their fish and has allowed prices to be dictated by buyers of the fish. Inhabitants in the fisheries area perceive problems, and they see a need to take measures against coastal fisheries dying out. Emphases in strategies on supported activities also flow from the said problems.
- ▶ Visions, objectives – although the vision and objectives of each fisheries area vary, they also contain several shared components. In brief, it may be said that the vision for the fisheries areas is to be a viable fisheries area where the traditions of coastal fisheries are preserved and where sustainable fisheries principles are being implemented. In addition to their individual visions, the fisheries areas have set out specific objectives related to their chosen action areas.
- ▶ Action areas – all of the fisheries areas are active in the five common action areas, which are also action areas supported under measure 4.1 (sustainable development of fisheries areas) of the Operational Programme of the European Fisheries Fund 2007–2013. The Lake Vörtsjärv fisheries area has set out two additional action areas (eel fishing industry and dredging landing places).

All of the fisheries areas share the action areas of:

- Renewal of fishing ports and landing sites
 - Processing and direct sales of fisheries products
 - Regenerating and developing fisheries-related tourism and coastal villages
 - Diversification of activities
 - Training activities
- ▶ Project selection – action areas are implemented via calls for proposals. Project selection in the fisheries areas follows a similar process. For the evaluation of projects, all of the fisheries areas have defined evaluation criteria by action area.
 - ▶ Financing – with the assistance of funds from the European Fisheries Fund, approximately 400 million EEK is envisaged for supporting the activities of the fisheries areas from 2007–2013. The fisheries areas plan the largest support amount for the renewal of fishing ports and landing sites, for which 53% of the aggregate support amount is envisaged in the fisheries areas. Also, within individual fisheries areas, the biggest support amounts in most areas are envisaged for this action area. Support on a larger scale is also provided for activities in the action areas of the processing and direct sales of fisheries products and for the development of tourism and regeneration and development of coastal villages. The action area of the diversification of activities and training activities are supported on a smaller scale.



Annex 1 – Background information

This table is based on information provided by the fisheries areas (strategies and May 2010 inquiries requesting information). Neither those who compiled nor the party that commissioned the paper have undertaken a separate verification of the submitted data.

| No | Indicator | Harju | Hiiu | Lääne | Peipsi | Pärnu | Saare | Viru | Võrts |
|----|--|--|---|--|---|------------|--|--|---|
| 1 | Population in the fisheries area | 38 142 | 10 097 | 11 298 | 30 723 | 22 113 | 19 889 | 18 158 | 18 000 |
| 2 | Number of commercial fishers | 393 | 160 | 177 | 335 - 393 | 353 | 239 | 240 | 41 |
| 3 | Average age of commercial fishers | 52 | 48 | 52 | ~43 | > 45 | 61 | 58 | 51 |
| 4 | Volume caught (kg, 2008) | 239 417 | 108 471 | 101 623 | 2 089 305 | 11 276 251 | 383 000 | 587 300 | 338 000 ¹³ |
| 5 | Number of those employed in the processing of fisheries products and in aquaculture | ~1060 (including Tallinn ~1,000 and Maardu ~30) | 2 ¹⁴ | 6 | 263 | 390 | 248 | * | 5 |
| 6 | Number of fishing ports and landing sites | ~100 | 67 | 74 | 72 | 72 | 65 | 50 | 33 |
| 7 | Number of micro-businesses engaged in processing fisheries products | 4 | 1 | 1 | 11 | * | 3 | 4 | 1 |
| 8 | Number of business operators engaged in providing fisheries tourism services in a fisheries area | 3 | 21 | 9 | 13 | * | 5 | * | 10 |
| 9 | Direct sales facilities (existing direct sales facilities - informal markets, markets etc) | 3 | Fresh fish may be purchased at the shops of the Hiumaa consumer co-operative and AS Hiumaa Mereagentuur, a sales outlet at Kärdla market, and also straight off the boat in nine ports. | For direct sales, there are 2 stands, 1 in Haapsalu and 1 in Lihula. | Räpina market, Kolkja sales outlet, Katroni, 3Kuldkala and Mehikoorma, Kallaste, MIF Laine, Omedu Rand, Vasknarva, Lohusu and Alajõe ports, in addition to 5 smoked fish outlets. | * | Sales at co-operative shops, the fishmonger's shop on Kitzbergi street, large shopping centres, directly in ports. | For direct sales, there is a mobile fish truck in rural areas and the town markets in Rakvere, Narva-Jõesuu and Kunda. | Viljandi market, (fisheries companies engaged in sales and production which have notified the Veterinary and Food Board). |

¹³ As at 2009

¹⁴ As of May 2010, 2 people (1 full-time) are employed in aquaculture; to date, the fish processor has no employees.

* No data available for these indicators





A COMPARATIVE ANALYSIS OF THE STRATEGIES OF FISHERIES ACTION GROUPS

